

INTERNATIONAL RELATIONS THEORY AND THE INTERNATIONAL
RELATIONS OF THE MIDDLE EAST: A STATE OF THE FIELD
STUDY

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ABSTRACT

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This thesis analyzes the level of interaction between International Relations theories and the literature on the international relations of the Middle East. The disciplines- area studies controversy is analyzed in a way to account for the low level of cooperation between International Relations as an academic discipline and Middle East studies. The thesis looks into the literature in order to demonstrate to what extent developments in International Relations theories informed the study of the international relations of the Middle East. The thesis emphasizes the need for a normative/ critical approach in order to overcome the bridge between these fields caused by epistemological and methodological as well as by the political economy of scholarship informed by ideological rivalries.

Keywords: International Relations theories, Middle East studies,
international relations of the Middle East, critical theories

ÖZ

ULUASLARARASI İLİŞKİLER TEORİLERİ VE ORTADOĞU'DA ULUSLARARASI İLİŞKİLER: BİR SAHA FOTOĞRAFI ÇALIŞMASI

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Bu çalışma, Uluslararası İlişkiler teorileri ile Ortadođu'nun ilişkilerini inceleyen literatür arasındaki etkileşimi konu edinmektedir. Bu iki alan arasındaki düşük etkileşim seviyesini açıklayabilmek için disiplinler- alan çalışmaları tartışmaları çerçevesinde bir akademik disiplin olarak Uluslararası İlişkiler ve Ortadođu Çalışmaları alanı üzerinde durulmuştur. Çalışma, Uluslararası İlişkiler teorilerindeki deđişim ve gelişmelerin Ortadođu'nun uluslararası ilişkilerini konu edinen akademik çalışmalara ne derece yansıdığını ölçmek için literatür taraması yöntemini izlemiştir. Tez, iki alan arasında epistemolojik ve yöntemsel farklılıklar yanında her iki alanın ekonomi-politiđi nedeniyle oluşan farklılıkları azaltmak için deđer temelli ve eleştirel bir yaklaşımın gerekliliđine dikkat çekmektedir.

Anahtar Kelimeler: Uluslararası İlişkiler teorileri, Ortadođu Çalışmaları, Ortadođu'nun uluslararası ilişkileri, eleştirel teoriler

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CHAPTER 1

INTRODUCTION

This study deals with how International Relations theories (IR) were made use of in the analysis of the international relations of the Middle East. Recently many accounts of the region as well as those in the IR community complain from the inadequate use of theory in explaining international relations of the Middle East. We are witnessing calls for bridging the gap between IR and study of the Middle East international relations even more frequently after 9/11. While some of these calls are merely referring to the presumed inability of Middle East scholars to adequately further American interests¹; some argue that only through more vigorous and critical studies can we overcome our embedded biases regarding the region. Another concern that is felt especially with the invasion of Iraq is the re-emergence of self-assumed area experts or Arabists who have started to dominate the media and the literature.

The task of examining why International Relations theory has not met with Middle East studies proved to be too hard. The task required looking into disciplinary politics of IR; the development of Middle East studies and merging of these two factors.

Realism has been the paradigmatic glass of IR community despite challenges it has faced for a long time. Difficulties with IR, however, go

¹ For a critique see Zachary Lockman, *Contending Visions of the Middle East: The History and Politics of Orientalism*, (Cambridge: Cambridge University Press, 2004), pp.257-265. Also see Pinar Bilgin, "Is the 'Orientalist' past the future of Middle East Studies?", *Third World Quarterly*, Vol.25, No.2 (2004), pp.423- 433, especially pp423- 425.

far beyond the problems and opportunities brought into the discipline with realism.

Discussion of epistemological foundations and ontological elements of IR as a discipline pose far harder questions for a thorough understanding. Questions about constitutive features of sciences and of social sciences are points one has to reflect upon when thinking about IR. The discussion starts with what constitutes a social science; which criterion has to be met for an endeavor in one branch would rise up to the status of science.

Delineating disciplinary politics of IR have its own difficulties along with those overall questions. There has not been a consensus as to when the discipline was born; whether it is "science at all" or about its "true" historiography. Trying to make sense of these questions proved to be even harder while trying to relate its interaction with the study of a particular region through IR lenses. This factor added to the picture the politics of Area Studies. Coupling this factor with a similar question and challenges in the Area Studies, let alone distinctive features of Middle East Studies within it, further complicates the picture.

The fact that the region that is examined is the Middle East brings to the fore another set of complexities. The same puzzlement with definitions, body of knowledge and utilization of knowledge about the region further complicated the overall task. Coupled with the history of the region, when there is a huge body of literature on the interpretations of this history, resulted in a task where the I had to embark on a task far beyond my qualifications.

To overcome my own failures in completing this task; I had to make important omissions that were included in the original project. Rather than evaluating studies on their capacities for critical reflection; the present study focuses on their utilization of International Relations

Theories. Thus, the works that are examined are not judged from a primarily critical perspective.

I have used a modified version of the taxonomy that is proposed by Fred Halliday² in evaluating the studies that treat the Middle East from an IR perspective. I was not sure whether to utilize a chronological taxonomy; dominance of realist perspectives up until late 1960s, challenges from dependency school between late 1960s and late 1970s, modified realist perspectives in the late 1980s and early 1990s; challenges from Constructivism from the early 1990s on, and the flourishing critical perspective in the last years. Another version of this chronological taxonomy could be provided by reference to the Cold War; and actually both versions are referred to in the text. The reasons for not going along with these two versions were the meta-temporary and eclectic use of theory. Although some of the works that are examined can be studied around the zeitgeist of Cold War or in the political environment within which they were born; delineating such a time frame did not appear to be right as most of the work that is studied aspire to be ahistoric. Thus, it appeared a better path to follow Halliday's taxonomy which was centered around primary approaches within IR theory.

Hence, Chapter II looks into the controversy between area studies and disciplinary social sciences and tries to understand the epistemological reasons behind the gap between IR and Middle East Studies (MES). Also, the chapter contains a brief discussion of the epistemological and disciplinary discussions within IR in order to further investigate the roots of the gap.

Chapter III then looks into case studies in line with the taxonomy referred to above. The case studies are examined on the merits of

² Fred Halliday, *The Middle East in International Relations: Power, Politics and Ideology*, (Cambridge: Cambridge University Press, 2005).

applying IR theory to the region rather than their ability/ inability to reflect on the international relations of the region. The chapter is selective in the case theories it put under limelight. I have chosen those studies who were more explicit in use of theory. This I believe was unavoidable due to the difficulty of gathering meaningful data from the huge volumes of otherwise overtly eclectic studies. Although this study is not about IR theory in essence and the works that are examined are not judged from a theoretical point of view; I have tried to add introductory remarks about the perspective that is used; in some cases those remarks were more elaborate while for others, whose critique is reflected in the text, they rather had to be kept shorter.

The thesis reaches two basic conclusions: First, it argues that the reasons for the gap between IR and MES lie at their constructed disciplinary politics and epistemologies. While MES was interested in gathering data; IR was looking for law-like generalizations in order to explain international politics. Second, it concludes that without overcoming ethnocentric bias inherent in IR through critical theory building; dominant voices of IR will represent and reproduce normatively loaded images of the region and will always find paths to undertheorize the region. In addition to these two primary conclusions; I have focused on Critical Security Studies in order to compensate for the lack of critical review in the previous chapters and also remind myself that whatever present representations of the region; it is possible to study it alternatively through a critical lense. Finally, it should be noted that the literature examined here is Anglo-American in essence as I was not able to follow literature in the region's languages.

CHAPTER 2

AREA STUDIES vs. DISCIPLINES?

The rift between disciplines and area studies has direct implications for how international relations theory plays a role in the analysis of the international relations of the Middle East.³

The Middle East as a geographical area⁴ seems to be less affected by developments in the theory. This explains why we have to look at the relation between area studies and disciplines, thus, a careful examination of International Relations as a discipline and its theory.⁵ Either there was a lack in the discipline itself or in the Middle East specialists that failed to apply theories. Or the problem was with the

³ See Morten Valbjørn, "The Meeting of the Twain: Bridging the Gap between International Relations and Middle East Studies", *Cooperation and Conflict: Journal of the Nordic International Studies Association*, Vol.38. No. 2, 2003, pp.163- 173.

⁴ For problems related to "definitional and delienational dilemmas" of the Middle East as an area see, Fawaz A. Gerges, "The Study of Middle East International Relations: A Critique", *British Journal of Middle Eastern Studies*, Vol. 18, No.2 (1991), pp. 208-220, especially pp.209- 212. Also see Zachary Lockman, *Contending Visions of the Middle East: The History and Politics of Orientalism*, (Cambridge: Cambridge University Press, 2004), pp.91- 98 and for a review of the question from a critical perspective see, Pinar Bilgin, "Whose 'Middle East'? Geopolitical Inventions and Practices of Security", *International Relations* Vol.18, No.1 (2004), pp.25- 41.

⁵ Andrea Teti, "Divide et impera: Notes on the origins of the interdisciplinary divide between IR and Middle East Studies" not to be circulated draft retrieved from Teti's webpage on June, 2006. The draft is no longer online, though was published in 2006 see "the Middle East and the Disciplinary -(Re)Production of Knowledge," in Meike Bal, (ed.) *Commitment and Complicity*, (Amsterdam: Universiteit van Amsterdam Publishers, 2006) and Andrea Teti, "Bridging the Gap: International Relations, Middle East Studies and the disciplinary politics of the Area Studies Controversy", *European Journal of International Relations*, Vol .13 No.1, (2007), pp.117-145.

low level of cooperation between the two. This chapter will look at this relationship from several aspects. First, origins of area studies will be examined and will be linked with the disciplines- area studies controversy and then, some defining features of IR theory will be examined to extent that they relate to the disciplines- area studies controversy.

The area studies- disciplinary social sciences debate is crucial for the aims of this chapter. As the chapter tries to understand to what extent International Relations theory does and can affect analysis of the international relations of the Middle East, it is imperative to look at how social science disciplines interact with area studies.

In order to do that I first examine what is meant by area studies, its origins, and ultimately its relation to disciplinary social sciences.

How can areas studies be defined? One definition for area studies argues that the post-World War II project of area studies was an attempt by the major centers of academic learning to delineate relatively large geographic regions that possessed some cultural, historic, and linguistic coherence.⁶ However, this quite "objective" definition does not go without reservations. Some perceive area studies, from a Saidian perspective,⁷ as the organization of teaching and research along the lines of geographical and cultural regions which functions as the intellectual arm of a larger Orientalist enterprise in which Western intellectuals seek to represent the non-West in ways that are convenient, self congratulatory and ultimately distorting.⁸

⁶ Ali Mirsepassi, Amrita Basu, and Frederick Weaver, "Introduction: Knowledge, Power, and Culture" in Ali Mirsepassi, Amrita Basu, and Frederick Weaver (eds.), *Localizing Knowledge in a Globalizing World: Recasting the Area Studies Debate*, (Syracuse, New York: New York University Press, 2003), p.2.

⁷ See Edward Said, *Orientalism* (New York: Vintage, 1978).

⁸ Ali Mirsepassi, Amrita Basu, and Frederick Weaver, "Introduction: Knowledge, Power, and Culture", op.cit.

Thus, an alternative definition for area studies would argue that it is a body of knowledge produced mostly by Western scholars for Western audiences about non-Western societies, cultures, and histories.⁹ David Ludden proposes a parallel view as to the origins of area studies:

Area studies began to evolve with an accumulation of universal and contextual knowledge from various disciplines as part of a broad effort to make university education commensurate with the expansion of European power. The birth of area studies can be seen in Enlightenment efforts to support theories of human progress by comparing Europe to other regions of the world, and this tradition of universal comparison and ranking is being carried into the twenty-first century by theorists of modernity and development for whom Marx and Weber set the tone.¹⁰

On the other hand, along with these “critical” perceptions of area studies as a “politically motivated”¹¹ academic genre, there are those who argue that area studies provides a detailed account of cultural areas which had stayed on the peripheries of world politics and thus would have continued to have little relevance in the absence of area based scholarship. In these accounts, area studies served to place experiences on the fringes at the forefront of intellectual inquiry and in so doing reconfigured the relationship between margins and centers.¹²

Beyond definitional positions is the debate that is sparked by what is termed today as “the crisis of area studies.” These debates, however, have portrayed that the reasons that lie at the roots of this crisis is nothing recent. Rather, the crisis of area studies should be sought in the very foundations of departmentalization of social sciences into disciplines and the problematic foundations of area studies scholarship.

⁹ Ibid., p.1.

¹⁰ David Ludden, “Why Area Studies?” in Mirsepassi, Basu and Weaver, *op.cit.*, pp.131-132.

¹¹ “Area studies have always been sensitive to changing political and intellectual conditions. The major Western powers brought area studies into being in the aftermath of World War II in an effort to understand and influence geopolitical alignments.” Mirsepassi (et.al.), *op.cit.*, p. 3.

¹² Ibid., p.2.

Whichever position is to be taken though, according to one account, the current crisis of area studies is of a different order of magnitude and it concerns the very fate of area based knowledge in a globalizing world.¹³

Discussions about the relation between area studies and disciplines can be studied in two fashions. The first is based on the epistemological foundations of social science disciplines and area studies. The second, on the other hand is based on the challenge of globalization which has put area studies scholarship on defense and initiated arguments about its crisis starting with the end of the Cold War. Nevertheless, both of these fashions are quite dynamic processes and continue to evolve and be reflected upon by both social scientists and area studies experts.

The rise, expansion, and demise of area studies have been associated with changes in the geopolitical context. It is argued that the only way to overcome this flaw which lies at the heart of area studied is to sever the links between knowledge and power.

Geopolitical considerations influenced decisions about which areas of the world to be funded.¹⁴ For instance, in the initial phases of area studies China and Southeast Asia attracted huge funds while South Asia couldn't in line with US interests. Also as quoted in Bruce Cumings¹⁵; CIA's compartmentalization of its internal organization along research/ operations division influenced US academy's disciplines/ area studies division. It is known that the CIA has shaped and funded major research centers as well as influencing research agendas. Both private and state funds were fundamentally critical for the initiation of area

¹³ Ibid.

¹⁴ Peter Johnson and Judith Tucker, "Middle East Studies Network in the United States", *MERIP Reports*, No. 38, (June, 1975), p.6.

¹⁵ Bruce Cumings, "'Boundary Displacement: Area Studies and International Studies during and after the Cold War," *Bulletin for Concerned Asian Scholars*, January-March 1997, p. 12.

studies. Grants from the Ford Foundation, Social Science Research Council, and the American Council of Learned Societies were instrumental in funding initially but by the early 1990s they withdrew support and area studies experts felt jeopardized by the dominance of academic disciplines.¹⁶

As the Gulbenkian Commission on the restructuring of the Social Sciences¹⁷ reports, it is impossible to disentangle the project of area studies from its political surrounding.¹⁸ According to the authors of the Commission, area studies programs were designed to train specialists which the United States needed as a consequence of its expanding worldwide role.¹⁹

However, throughout 60s and 70s scholars from within Cold War areas studies scholarship started to criticize these politically shaped research agendas and their political implications as was seen in their opposition to the Vietnam War. During 70s and 80s, quality of area studies improved took a more inter-disciplinary outlook. Though, the funds

¹⁶ Mirsepassi (et.al.), op.cit. Also see, Leonard Binder, "Area Studies: A Critical Reassessment" in Leonard Binder (ed.), *The Study of the Middle East: Research and Scholarship in the Humanities and the Social Sciences*, (New York: John Wiley & Sons, 1976), p.1.

¹⁷ The Gulbenkian Commission itself is a case in point in portraying the role Orientalist play in the study of regions. The Commission was named after and was commissioned and formed by Calouste Gulbenkian, an İstanbul born Armenian. Gulbenkian was an historic personality with his role in the post-World War I oil politics as well as his deep interest in arts. For some he is a philanthropist while for others his (in)famous nickname which refers to his shares in the Turkish Petroleum Company represents him better "Mr. Five- Percent". See Nazife Şişman, "Philantropist'ler, sanatseverler ve ötekiler" in *Anlayış*, Vol. 40, October, 2006, pp.78-79 for a critical review of the role Gulbenkian played in history, and the Lisbon based Calouste Gulbenkian Foundation's web site for his biography: <http://www.gulbenkian.org/english/main.asp>

¹⁸ The Gulbenkian Commission on the Restructuring of the Social Sciences, *Open the Social Sciences*, (Stanford, California: California University Press, 1996), pp. 37-39.

¹⁹ Ibid.

rapidly shied away from area studies to more universal/ global research agendas.²⁰

Among other scholars, Timothy Mitchell²¹ has a different account on the origins of area studies compared with above accounts which seek the origins of area studies in the post-World War II period. He traces the origins of area studies back to the inter-war period. According to him it was not the ensuing crises of the Cold War that gave birth to area studies. He argues that the frequently cited passage of the national Defense Education Act in 1958, which for him was the most important event in the organization of postwar U.S. area studies; was related more to domestic ideology than Cold War politics. The Act as well as the Sputnik crisis had rather delayed the funding of area studies programs in the U.S., and thus had set back developments that were already under way.

In line with these points, he argues that simultaneously political and intellectual developments in the interwar period laid grounds for the emergence of area studies. Quoting Edward Said, he argues that these developments had their roots in the period of civilizational anxiety of the interwar period, especially in Europe, thus turning to the study of Oriental civilizations; therefore as new ideas of total humanistic knowledge fostered by classical studies and histories of civilizations were borrowed, scholars began to see in the idea of another civilization "the other" for Europe. A similar point is made by Ludden according to whom area studies served to elaborate the contrast between Europe and other areas.²²

²⁰ Mirsepassi (et.al.), p.4.

²¹ Timothy Mitchell, "Deterritorialization and the Crisis of Social Science", in Mirsepassi (et.al.), pp. 148-170; especially pp.148-149.

²² Ludden, op.cit., p. 133.

Mitchell concludes that whereas in earlier decades what distinguished the disciplines were the different kinds of social questions they addressed, "in a process beginning in the 1930s and completed by the 1950s, the social sciences transformed themselves into, as it were, a kind of area studies. Each created an object that marked the exclusive territory of the discipline and defined its boundary with others."²³

The first account argues that the current crisis in area studies arises from the conjunctures of two related developments: the end of the Cold War and the 'recent' phenomenon of globalization.²⁴ Other works add to this list the concern with Orientalism which had a "chilling effect on area studies scholarship."²⁵ As the criticisms of Said and others have pointed to the relation between knowledge and power in area studies; a tendency has developed to question the value of the study of non-Western societies which has shied many people away from area based scholarship.²⁶

Mirsepassi (et.al.) argues that the academy has developed three overall responses to the crisis of area studies: Formal Social Science theory, cultural/ post-colonial studies, and global/ globalization studies.

Formal Social Science theory involves the use of formal models to develop general propositions about the empirical world; i.e. the academic disciplines:

²³ Mitchell, op.cit., p.154. Mitchell elaborates these points and discusses the impact of the questions of modernity on the social sciences elsewhere. For this account see, Timothy Mitchell, *Questions of Modernity*, (Minneapolis: University of Minnesota Press, 2000).

²⁴ Mirsepassi (et.al.), op.cit., p. 5.

²⁵ Mark Tessler, Jodi Nachtwey and Anne Banda, "Introduction: The Area Studies Controversy" in Mark Tessler with Jodi Nachtwey and Anne Banda (eds.), *Area Studies and Social Science: Strategies for Understanding Middle East Politics*, (Bloomington: Indiana University Press, 1999), p.x.

²⁶ Ibid.

... the distinction between academic disciplines and area studies is rooted in a narrative of Western modernity. Disciplinary knowledge, which makes supposedly universalistic claims, comes out of the experience of modern European societies. By contrast, area studies knowledge which makes supposedly particularistic claims, speaks about the non-Western world and thereby stands in a problematic and even contested relationship to disciplinary knowledge.²⁷

With this phase, social sciences increasingly turned to formal modeling and theoretical constructions based on the paradigm of neoclassical economics.²⁸ Thus, the position taken by this approach has been one that is divorced from time and place, while the other approach was defined as being time and place bounded. As a result we have seen dominance of rational choice theory, game theory and social choice theory.²⁹ Therefore, the position of this first approach has been to see the role of area studies only as furnishing contextual evidence for broad based theories.

As we turn to the second response developed within the framework of post-colonial or post-modern cultural studies which is termed also as "the reflexive turn",³⁰ against universalistic forms of knowledge and toward increasing homogeneity, this trend questions master narratives

²⁷ Mirsepassi (et.al.), op.cit., p.6.

²⁸ For a critique of the implication of this trend for International Relations discipline, see Alexander Wendt, "Anarchy is What States Make of It: the Social Construction of Power Politics", *International Organization*, Vol. 46, No: 2, 1992, p. 409.

²⁹ See Ian S. Lustick, "The Disciplines of Political Science: Studying the Culture of Rational Choice as a Case in Point", *PS: Political Science and Politics*, Vol.30, No.2., June, 1997, pp. 175-179 for a review of the implications of employing rational choice theory. Also see a similar critique in Mark Tessler, Jodi Nachtwey and Anne Banda, "Introduction: The Area Studies Controversy" in Mark Tessler with Jodi Nachtwey and Anne Banda (eds.), *Area Studies and Social Science: Strategies for Understanding Middle East Politics*, (Bloomington: Indiana University Press, 1999), p.ix. For a critical view of rational choice theory see Chalmers Johnson, "Preconception vs. Observation, or the Contributions of Rational Choice Theory and Area Studies to Contemporary Political Science", *PS: Political Science and Politics*, Vol.30, No.2., June, 1997, pp. 170- 174. A

³⁰ Tessler (et. al.), op.cit., p. ix.

and privileges the local, the contextual, and the particular. Being committed to interdisciplinary and contextually formed knowledge but at the same time critiquing traditional notions of what constitutes an area and by questioning the connections between area studies and the social sciences, this approach has both strengthened and weakened area studies scholarship.³¹

It is possible to identify two particular criticisms directed by post-colonial studies to area studies scholarship: for neglecting popular culture in favor of formal political systems, and for being unable to adapt to a rapidly changing world in which national boundaries are becoming more and more obsolete. In Arjun Appadurai's words: "the area studies tradition has probably grown too comfortable with its own maps of the world, too secure in its own expert practices, and too insensitive to transnational processes both today and in the past."³² According to this approach area studies scholarship should problematize the empirical and conceptual problems posed by the territoriality of knowledge as well as reconsider its excessive focus on the nation state. However, it is still supportive of area based knowledge as the close knowledge of regions outside North America promises to provide a strong base from where Eurocentrism of the academy and the binaries it has created between the West and the Rest can be challenged.

The third approach, the globalization studies, have fundamental similarities with the social science disciplines whereas the disciplines believe they can assume a universality in human motives and relationships, globalization studies investigate the processes that supposedly are creating those universals through a single, integrated world system with strongly homogenizing tendencies. According to Mirsepassi (et. al.), this commonality between the disciplines and

³¹ Mirsepassi (et. al.), op.cit. pp. 8-9.

³² Arjun Appadurai, *Modernity at Large: Cultural Dimensions of Globalization*, (Minneapolis and London: University of Minnesota Press, 1996), p.17 quoted in Mirsepassi (et.al.), op.cit., p.9.

globalization studies has its roots in their commitment to a Weberian notion of modernization as the faith of our time:

...that modernity was identical to the creation of Europeanized societies. As a result those scholars [the legacy of towering Western intellectuals-including Marx, Weber, Habermas, and Giddens-] failed to recognize the different histories and cultural visions of non-European encounters with modernity or had little to say about the ways in which colonization contributed to the European experience of modernity.³³

As a consequence, when scholars have assumed that non-Western societies are incapable of articulating a cultural vision that is compatible with their experience of modernity, a natural outcome has been the separation of intellectual studies, the disciplines, and area studies or the empirical study of non-Western societies.

Consequently, one can argue from above picture that area studies scholarship is invaluable in challenging the universalistic claims of disciplines and thus bringing the picture portrayed by them into critical scrutiny. It is crucial to utilize insights of area studies scholarship in order to force disciplines into an awareness of their Eurocentric/ethnocentric biases.

On the other hand, what is termed as the crisis of area studies carries both opportunities and dangers as the simultaneous decline of area studies and growth of globalizations studies continue despite with certain reservations especially caused by the impact of September 11 on how world politics is perceived today.

The opportunities lies ahead as area studies scholarship opens up appreciation of hybrid and multilingual identities, as well as the complex character of local-global linkages and thus culminates in thinking about place-based identities in less bounded ways. However, one has to be aware of the dangers of this simultaneous process as

³³ Ibid., p.11.

there raises a tendency for us to disparage place based knowledge and embrace globalization uncritically via disregarding its uneven character. Also the tendency to embrace globalization studies has the potential to fall back on the disciplines as sources of universal knowledge, thereby disregarding its provincialism.

To turn to the first fashion, namely the epistemological roots of the rift between area studies scholarship and disciplinary social sciences there are important aspects to be looked at, despite several of these points have been stated above.

According to Tessler (et.al.), at the heart of the controversy, between discipline-oriented social scientists and regional specialists, is an important disagreement about social science epistemology, about what constitutes, or should constitute, the paradigm by which scholars construct knowledge about politics, economics, and international relations in major world regions.³⁴ In this controversy, area studies scholarship is said to seek mastering the literature on a region, while social scientists seek to master the literature of a region.³⁵

Discipline oriented scholars argue that the work of area specialists lacks rigor and thus fails to be counted as scientific as they favor description over explanation. They also argue that area studies scholarship lacks analytical cumulativeness, and shows no interest in parsimony and generalization as they are overly preoccupied with detail and specificity.³⁶ In response, disciplinary social scientists are charged with oversimplification, and sitting at the ivory tower; implying that disciplinary scientists' theoretical frameworks and their highly abstract

³⁴ Tessler (et.al.), op.cit., p.vii.

³⁵ Robert H. Bates, "Area Studies and the Discipline: A Useful Controversy?" in *PS: Political Science and Politics*, Vol.30, No:2, June 1997, p.166.

³⁶ Tessler (et.al.), op.cit. p.viii.

models provide little real insight into the complex behavior patterns or events they try to explain.

Thus, it is obvious that there is an intellectual divide between these two scholarly approaches. However, many works cited above also emphasize the point that despite these intellectual and epistemological clashes, as well as clashes within academic institutions on issues like faculty hiring³⁷ and allocation of funds, the rift is not so deep in the real world. Area specialists are deeply embedded in theoretical analysis as much as disciplinary scientists are bounded with the need to employ empirical data from the ground. However, we can still pursue a differentiation in epistemological standing with one putting emphasis on the universal and the other on local, which gives way to the contemporary discussions about the global-local linkages.

When Rashid Khalidi brought the issue of the relevancy of Middle East Studies and asked whether Middle East Studies had any future, to the forefront at the annual MESA³⁸ meeting in 1994³⁹, it was a time when there were enough reasons for Khalidi to be worried. However, MESA president not only expressed his concern with the fate of Middle East studies in United States, he also made quite harsh criticisms of the Middle East Studies scholarship.

According to Khalidi, MES scholars had done "a poor job of reaching out from the comfortable confines of the universities and research institutes" where they thought and conducted research. Khalidi adds that MES scholars have become provincial and over-specialized as a

³⁷ See Christopher Shea , "Political Scientists Clash over Value of Area Studies", *The Chronicle of Higher Education*, 10 January 1997, p.A13.

³⁸ See Lisa Hajjar and Steve Niva, "(Re)Made in the USA: Middle East Studies in the Global Era", *Middle East Report*, No. 205, October-December 1997, pp.2- 9. and Lockman, *Contending Visions of the Middle East*, op.cit. ,p.128 and p. 162.

³⁹ Rashid Khalidi, "Is There a Future for Middle East Studies? (1994 Presidential Address)", *Middle East Association Bulletin*, July 1995.

consequence of failing to remain in touch with developments within their professional disciplines in the social sciences and humanities. In his controversial speech, Khalidi also drew attention to the restructuring of funding policies by leading foundations as well as government and argued that funds were increasingly directed towards globalization studies.

2.1 Self Images and Disciplinary History of IR:

In order to understand where IR falls in the area studies- disciplines controversy, this section examines some of the self- images of IR theory and its development as an American social science; a branch of disciplines that seeks universally valid answers to the problems of its time through a positivistic epistemology.

Steve Smith argues that IR has told a fairly consistent story about its history; and in two forms; in chronological and "great debates" terms.⁴⁰ The discipline's story in chronological terms starts with "dominance of idealism in the interwar years, progressing to the dominance of realism after the Second World War and, then, after an interregnum during which a variety of approaches vied for dominance." The second version Smith refers to is the story of great debates between competing theories:

...between idealism and realism in the late 1930s; between traditionalism (realism) and behaviouralism in the 1960s; between state-centric and transnationalist approaches in the 1970s; between three competing paradigms in the 1980s...and between the neo-neo synthesis (also known as rationalism) and a set of alternative approaches (known as reflectivism) since the early 1990s⁴¹

⁴⁰ Steve Smith, "The discipline of international relations: still an American Social Science?", *British Journal of Politics and International Relations* Vol.2, No. 3 (October, 2000), pp.374- 402, p.376.

⁴¹ Ibid.

As Smith argues elsewhere; these self-images of the discipline importantly misrepresent the history of the discipline. These misrepresentations, according to Smith, help constitute privileged understanding and interpretations within IR, thus silencing certain other perspectives, especially those that are not positivist in epistemology.⁴² Additionally, Smith argues that these self-images paint a picture where IR is represented far more open to pluralism and openness than it really is. Also, these conventional stories suggest that IR has progressed toward truth about international relations by way of these debates; each debate taking us closer to the truth.

Quoting Brian Schmidt, who exposes “deep discursive continuities between the early- twentieth- century analyses and the contemporary field of study,”⁴³ Smith draws attention to particular misrepresentations in the field of IR. First misrepresentation regards the starting date of the discipline which is conventionally dated back to the foundation of the first Department of International Politics at University of Wales, Aberystwyth in 1919⁴⁴ while study of IR dates way before First World War.⁴⁵ This, according to Smith prepares ground to read the new discipline as idealist; in other words in terms of preventing catastrophes of World War 1.⁴⁶ A second misrepresentation is the

⁴² Steve Smith, “The Self-images of a Discipline: A Genealogy of International Relations Theory” in Ken Booth and Steve Smith, *International Relations Theory Today*, (University Park, Pennsylvania: The Pennsylvania State University Press, 1995), pp.1-37, especially pp.13-21.

⁴³ Brian C. Schmidt, *The Political Discourse of Anarchy: A Disciplinary History of International Relations*, (Albany: State University of New York Press, 1998), p.2.

⁴⁴ For an excellent reflection on the role of the founder of the Department, Lord David Davies and an analysis about the present and future state of the discipline see, Ken Booth, “The Writing on the Wall”, *International Relations* Vol.21 No.3, 2007, pp.360- 366.

⁴⁵ Another study points to a related argument by asking the question that how can it be possible that speculation about the state goes back to antiquity whereas speculation about the relations between states goes back little further than to World War 1. See Torbjorn L. Knutsen, *A History of International Relations Theory* (Manchester: Manchester University Press, 1992), p.1.

⁴⁶ Smith, “International Relations: still an American social science?”, p.377.

presumed idealist work in the interwar period. As Schmidt argues, "the distinctiveness of their [idealists'] contribution lies not in their idealism but in their explicit attempt to mitigate the international anarchy.."⁴⁷

According to Smith, implications of "realism replacing idealism of the interwar period" depiction are of paramount importance for the nature and field of study of the discipline; as this depiction creates a "foundational myth" for the study of international relations. He argues that this foundational myth results into what he calls "disciplining of the discipline":

...the discipline gets defined as one founded on the problem of inter-state war and, thus, explaining this specific problem becomes the litmus test for international theory...those approaches that do not treat inter-state war as the core problem to be explained by the discipline run the risk of their work being deemed 'irrelevant' or 'not IR'...those approaches that do not start with both *inter-state* relations and with *war* are axiomatically placed in a defensive position with regards to their fit within the discipline...Similarly, those who want to look at actors other than the state are seen as dealing with issues of secondary importance.⁴⁸

According to Smith, this has been the reason why realism was successful in establishing its image as the timeless theory of international relations. In so far as realism was "shown" to have replaced idealism argues Smith, realism became the theory, especially in US IR community, that better captures 'realities' of the international politics which turns out to be another foundational myth of the discipline: "Only realism can produce knowledge about the world of international relations that is scientific."⁴⁹

This foundational myth according to Smith also results into silencing of alternative approaches to IR theory; such as idealism and Marxism, as

⁴⁷ Schmidt, op.cit., p.191.

⁴⁸ Smith, "International Relations: still an American social science?," p. 378; emphasis original.

⁴⁹ Ibid., pp.378-379.

those would be seen as infused with values that are outside of the "social scientific canon." Last, but not least Smith also sees development of IR as a separate discipline as another result of that foundational myth⁵⁰. At this point, it is useful to look at "American" features of IR as a discipline as that factor would relate to the development of MES within IR.

Stanley Hoffmann, in his famous 1977 article, argues that "IR is an American Social Science."⁵¹ His basic argument is that it was only in America that IR found appropriate conditions to flourish as a separate discipline. Hoffman argues that these specific conditions that emerged in the post- World War 2 era; makes IR an American social science.

Hoffmann basis his argument on a specific circumstance; and on three causes. The primary circumstance according to Hoffmann was the rise of the United States to a world power after World War 2 which was accompanied by two contradictory impulses: renewed utopianism and a mix of revulsion against and guilt about pre-war American idealism.⁵² He argues that it was Hans Morgenthau, who he also thinks of the founding father of the discipline, and Nicholas Spykman who thought Americans that foreign policy was about power, not about ideals. According to Hoffmann, among those social scientists who fled Europe for America, it was Morgenthau's interests that made him the founder of the discipline. Hoffmann's depiction of Morgenthau seems to be representative of coming mainstream IR scholars:

Morgenthau was a refugee from suicidal Europe, with a missionary impulse to teach the new world power all the lessons it had been able to ignore until then but could no longer afford to

⁵⁰ Ibid.

⁵¹ Stanley Hoffmann, "An American Social Science: International Relations", *Daedalus*, Vol.106 No.3 (Summer, 1977); reprinted in James Der Derian (ed.), *International Theory: Critical Investigations*, (New York: New York University Press, 1995), pp.212- 241.

⁵² Ibid., p.216.

reject....Steeped in a scholarly tradition that stressed the difference between social sciences and natural sciences, he was determined both to erect and empirical science opposed to the utopias of the international lawyer [E.H. Carr] and the political ideologies, and to affirm the unity of empirical research and or philosophical inquiry into the right social order. He wanted to be normative, but to root his norms in the realities of politics, not in the aspirations of politicians or in the constructs of lawyers.⁵³

Morgenthau's seminal work⁵⁴, however, argues Hoffmann, would not have played such a seminal role had three causes were not present in the post- War United States: intellectual predispositions, political circumstances, and institutional opportunities.⁵⁵

Hoffman draws attention to three intellectual predispositions: First; the profound conviction that all problems can be solved by applying the scientific method, assumed to be value free, which would result in practical applications for progress. Hoffman argues that the depth of faith in this "operational paradigm" made it specifically American. He argues that the fact that there was no competing paradigm, unlike the conservatist thought in Europe, from right or left further contributed into this process along with the American experience of economic development, social integration, and external success which kept reinforcing this set of beliefs. ⁵⁶

The second intellectual predisposition was the prestige and sophistication of the 'exact sciences. ' Hoffmann argues that "the quest for certainty, the desire to find a sure way of avoiding fiascoes and traumas, was even more burning in the realm of social sciences."⁵⁷ According to Hoffmann, because economics had found solution to the

⁵³ Ibid., p. 217.

⁵⁴ Hans Morgenthau, *Politics Among Nations* (New York: Knopf, 1948).

⁵⁵Hoffmann, "An American Social Science: International Relations", p. 218. It is noteworthy that; as will be seen in the section on Area Studies; these three causes seem to apply to the birth of Middle East Studies as well.

⁵⁶ Ibid., p. 219.

⁵⁷ Ibid.

age- old problems of scarcity and inequality; economics was set a role- model for other branches of social sciences in the United States; a model to be emulated. Additionally, like economics, political science, “the mother or stepmother of international relations”, in the United States was obsessed by the solution of pressing problems and spurred by the success of economics. Thus, scholars who sought for the masterkey to the problems of their time; looked into the discipline of economics, and in Hoffmann’s words, “tried in vain to make the concept of power play the same role as money in economics.”⁵⁸

The third predisposition Hoffman argues, was a “transplanted element”; the impact of European scholars who emigrated to the US, and who, coming from a very different intellectual tradition to that of IR in the US, tended to ask much larger questions, about ends, rather than means, about choices rather than techniques, and ask about them more conceptually than their US counterparts⁵⁹. Also; as Hoffmann puts it; those foreign social scientists who served as conceptualizers

reacted against the traditional intelligentsia of moralists, philosophers, and aesthetes by stressing that knowledge (not old fashioned wisdom) was power (or at least influence), they were not driven by the dream of knowledge *for* power.⁶⁰

Along with these three predispositions, Hoffmann argues, the superpower status of the United States after 1945 was a crucial factor in the growth of IR as a discipline. Thus, as he puts it, studying American foreign policy was tantamount to studying the international system, as American foreign policy was a virgin field for the study and the arena of a titanic contest.

⁵⁸ Ibid., p. 230. For a critique of macroeconomic analogies of structural theories of IR see, Alexander Wendt, “Anarchy is What States Make of It: the Social Construction of Power Politics”, *International Organization*, Vol. 46, No. 2, (1992), pp. 391- 422, p. 409.

⁵⁹ Smith, “International Relations: still an American social science?”, p. 393

⁶⁰ Hoffmann, “An American Social Science: International Relations”, p. 221.

Coupling US role in world politics was the chronological convergence between policy makers' needs and scholars' performances; in other words; "what the scholars offered, the policy makers wanted."⁶¹ At the intersection point of this convergence lied realism, according to Hoffmann. The policy- makers needed rationalization of their policies and realism put forward by those scholars provided them with it; only thanks to some disagreements between what is offered and done; and between some of its champions, could realism avoid from "being nothing but a rationalization of Cold War policies."⁶²

Hoffmann completes his depiction of the American IR by drawing attention to three sets of institutional opportunities; which have not existed elsewhere but United States, as well as being found simultaneously: Direct and visible tie between the scholarly world and the world of policy making, the networks of wealthy foundations, and a flexible university system. These three factors also played their role in the birth and development of MES in the US as well, as discussed in the coming pages.⁶³

Another self- image of the discipline that was effective in how IR and MES interacted was the question of Eurocentrism/ ethnocentrism in the discipline of international relations. It is argues that two interrelated facts; which are usually forgotten or silences, underlie how IR treats Third World in general, and the Middle East in particular:

First, the scholarly disciplines in the humanities and social sciences are all initially products of Western experience and thought. Second, the kind of knowledge that the Other, the object of Western

⁶¹ Ibid., p.222.

⁶² Ibid., p.223.

⁶³ For a comprehensive and critical review of the impact of these factors in the development of MES see, Zachary Lockman, *Contending Visions of the Middle East: The History and Politics of Orientalism* (Cambridge: Cambridge University Press, 2004), chapter 4.

knowledge...has of itself is therefore essentially Western knowledge even when it is locally produced.⁶⁴

Thus, argues Sharabi, that discursive processes of the Self and Other that is prevalent in the knowledge produced through social sciences produces two basic assumptions; the non- Western Other is always behind but will catch up with the West and the non- Western has a separate destiny; it is doomed to continue being the Other.⁶⁵

While Sharabi reflects on the implications of Eurocentric biases regarding the case of Arab society and culture; there are those accounts who argue that the same bias creates certain conceptual difficulties in studying IR of the Third World. The argument goes that the basic concepts of mainstream IR theory; such as anarchy, the international system, rational choice and game theories, sovereignty, alliances, and even the very concept of the state are situated in the Eurocentric, normative character of the literature on IR and thus do not conceptually fit into the study of IR of the Third World.⁶⁶ Furthermore, Neuman contends that IR literature on the Third World is diffused with unstated normative and empirically unsubstantiated assumptions; which are products of mainstream- Eurocentric theory.⁶⁷

⁶⁴ Hisham Sharabi, "The Scholarly Point of View: Politics, Perspective, Paradigm", in Hisham Sharabi (ed.), *Theory, Politics and the Arab World: Critical Responses* (New York and London: Routledge, 1990), pp.1- 51, p.2.

⁶⁵ Ibid., p.4. For a study that takes civilizational paradigm at its core through a discussion of the Self/ Other dilemma see Ahmet Davutoglu, *Alternative Paradigms: The Impact of Islamic and Western Weltanschauungs on Political Theory* (Lanham, MD: University Press of America, 1994)

⁶⁶ Stephanie G. Neuman, "International Relations Theory and the Third World: An Oxymoron" in Stephanie G. Neuman (ed.), *International Relations Theory and the Third World* (New York: St. Martin's Press, 1998), pp.1- 29.

⁶⁷ Ibid., p.2.

CHAPTER 3

APPLICATIONS OF IR THEORY TO THE MIDDLE EAST

According to Fred Halliday, good theory should be conceptually clear and rigorous, historically aware, able to yield substantive analysis and research agenda, and where appropriate, able to engage with ethical issues. In line with his definition, Halliday agrees into conventional taxonomy of IR theory into analytic and normative theories where the former is composed of sets of concepts designed to explain how international relations work; the latter is concerned about concepts about norms, and ethical issues within the international environment.⁶⁸ Thus, argues Fred Halliday, IR theory has to meet the terms of any social science: conceptual precision, theoretical range and historical sensibility. This does not, however, he argues, give autonomy about doing non-relevant work once you are dealing with a region. Thus, the question of analytical capabilities of a certain IR theory when applied to a region is justified. This is why those who call for bridging the gap between IR and MES point to a crucial aspect as if any theory of International Relations cannot help to explain the region, it cannot fly as an IR theory of general scope.⁶⁹

⁶⁸ Fred Halliday, *The Middle East in International Relations: Power, Politics and Ideology*, (Cambridge: Cambridge University Press, 2005), p. 21. For the explicit reason that this study is descriptive in essence; alternative taxonomies such as problem-solving vs. critical or positivist vs. post-positivist theories are not given enough place it otherwise deserves in any discussion of IR theory.

⁶⁹ *Ibid.*, p. 22.

This, however, raises another question regarding to what extent can epistemological foundations of IR theory that are explained in the previous chapter are applicable in the Middle East.

According to Fred Halliday, IR literature on the Middle East can be divided into five broad categories: historical analysis, realist paradigm and its modifications, foreign policy analysis, ideational explanations, and historical and international sociology. For the sake of argument, I will follow his taxonomy throughout this chapter and seek to reflect on relevant studies as they relate to the overall argument. For each approach, I will first try to give a background for its implications in IR theory and then will try to analyze the most reputable literature regarding that approach. The methodology will not be one that focuses on Middle East component of the studies that are examined, but will be one that will try to understand how IR theory is applied to the Middle East case. Thus, the reviews of the literature will not primarily test to what extent Middle East politics can be explained by the approach. It will focus on the methodology of utilizing IR theory in that region.⁷⁰

3.1 Historical Analysis

Historical analysis focuses on the history of a specific country's foreign policy in a limited time frame and tries to understand why and how state activity takes place through that historical narrative. Rather than being explanatory though, historical analysis is rather descriptive. Especially case studies focusing on a certain state's foreign policy tend to utilize this approach along with biographical studies about those states' leaders, such as on Ataturk and Nasser. According to Halliday, historical accounts are potent to shed greater insight into the

⁷⁰ Here it is also crucial to note the eclectic literature at hand while reading this chapter. For example, most of realist literature is examined in the modified realist framework of foreign policy analysis as it makes more sense to compare those writings in that broader context.

knowledge of Middle Eastern societies than some claimants of IR theory.⁷¹

According to Thomas Smith⁷², as international relations was not offshoot of history; it has tried to distance itself from historical discourse through methodological and theoretical innovations in its quest to find universal laws about international politics. This quest in his view resulted in what he calls the historical problem in IR. According to him, the historical problem in IR comprises epistemology, ideology, and sociology.

Epistemologically, "history turns out to be an indispensable, but fickle research partner" argues Smith. Thus, rather than being an independent body of knowledge whose parts fall neatly in analysis; history is utilized selectively; in line with needs of description and explanation a research endeavor requires.⁷³ He quotes Stanley Hoffmann's argument that

Many different readings of the same reality are possible. Even if all historians agreed on the facts, they would still disagree on the respective weight of those facts; in the act of 'imaginative reconstruction' that any causal analysis performs, assessments of motivation and causal efficiency vary considerably.⁷⁴

As with epistemological choices for eclectic use of theory; ideologically, argues Smith, history is ripe for partisan selection and interpretation. As history is reconstructed at the hand of the theorist, it is done through a selective and interpretative fashion by way of allying inquiry with one interpretive school while ignoring

⁷¹ Ibid., p.24.

⁷² See Thomas W. Smith, *History and International Relations*, (London and New York: Routledge, 1999).

⁷³ Ibid., p.2.

⁷⁴ Ibid.

others that are incongruent with the theorist's intellectual commitments.

Lastly, in terms of sociology, history is treated as a mere testing stage on the road to universally valid, positivistic theory; as "it is assumed that rationally justified assertions about the 'essential' nature of politics can be scientifically verified by observing its historical manifestations."⁷⁵

The five categories that Smith defines as the historical challenges faced by IR enables a critical reading of literature on the Middle East, especially in instances where enduring patterns are identified by those work. *Selection bias* can be systematic where serious scholarship is lacking or instrumental in instances where it is the result of a conscious choice in order to support or defy a certain theoretical position. Smith argues, "in all social science research, potential alternative explanations often reside in sources not enlisted or data not collected."⁷⁶ *Anecdotalism*, a sub-set of selection bias, generalizes from selected parts as a result of making deductions through handpicked events and narratives in order to support a particular argument. *Ahistoricism* "promotes political theory emptied of content and context, often in an effort to sidestep the idiosyncrasies of political choice and the process of change."⁷⁷ IR's preoccupation with timeless laws and its tendency to read the present back into the past are also examples to *ahistoricism*.

John Hobson's twin concepts of *chronofetishism* and *tempocentrism*⁷⁸ are also two neologies that deserve discussion at this point.

⁷⁵ Ibid., p.3.

⁷⁶ Ibid.

⁷⁷ Ibid.

⁷⁸ John M. Hobson, "What's at stake in 'bringing historical sociology back into international relations?' Transcending 'chronofetishism and 'tempocentrism' in international relations" in Stephen Hobden and John M. Hobson (eds.) *Historical*

Chronofetishism leads to three illusions in understanding international relations. First is the *reification illusion*, where the present is effectively sealed off from the past; thus presenting the "present" as static, self-constituting and autonomous. Second is the *naturalisation illusion*, which naturalizes a view of the spontaneous and natural emergence of the present. The third *immutability illusion* on the other hand, eternalizes the present in a way to rule out structural change. In addition to *chronofetishism*; *tempocentrism* leads to the crucial *isomorphic illusion* where naturalized and reified present is reflected backwards in time to present all historical systems as "isomorphic" or "homologous".⁷⁹

To continue with Smith's conceptualizations, *theoretical filtering* helps one to reinterpret history in a way to serve his/ her theory; which according to Smith is to some degree unavoidable in its simple form due to the need to merge history with theory. He argues that *theoretical filtering* also relates to the utilization of statistical methods especially when these methods propel research in a particular substantive direction.⁸⁰

According to Halliday, there are three limitations to the historical analysis approach; it overstates the degree of continuity over time, lacks comparative methodology, and suffers from the question of "which history?"⁸¹

Sociology of International Relations (Cambridge: Cambridge University Press, 2002), pp.3-41.

⁷⁹ *Ibid.*, pp.5-19

⁸⁰ Thomas W. Smith, *History and International Relations*, op.cit, p.4.

⁸¹ Halliday, op.cit., p.24.

The classical application of historical analysis approach to the Middle East is Carl Brown's 1984 study⁸² and now, it will be examined as a case study.

3.1.1 Carl Brown's Reading of Middle East Politics

Carl Brown's aim throughout the book is to show that international politics of the Middle East, hitherto defined as irrational, erratic, or chaotic, can be reduced to a discernable pattern. Thus, he explains from the onset of his study, his preoccupation with finding a timeless theory for explaining Middle East politics. His argument centers around historical continuity of the Eastern Game in Middle East politics and the resultant distinctive political culture.

He argues that while other parts of the world such as the Indian subcontinent, China, and most of Black Africa were also inflicted by great power politics; "no area has remained so unremittingly caught up in multilateral great power politics."⁸³ As such, he argues that Middle East is exceptional because it was continuously interlocked politically with the Western power system. The degree of that confrontation makes the Middle East, "the most penetrated international subsystem". Brown defines the penetrated political system as one

that is neither effectively absorbed by the outside challenger nor later released from the outsider's smothering embrace. A penetrated system exists in continuous confrontation with a dominant outside political system...That is, the politics of a thoroughly penetrated society is not adequately explained –even at the local level– without reference to the influence of the intrusive outside system.⁸⁴

What makes penetrated Middle East political system distinctive and enduring since the last two centuries according to Brown, is the

⁸² L. Carl Brown, *International Politics and the Middle East: Old Rules, Dangerous Game* (London: I.B. Tauris, 1984)

⁸³ *Ibid.*, pp. 3- 4.

⁸⁴ *Ibid.*, p.5.

“Eastern Question”; an old political game with its own elaborate rules that provides a key to understanding the political culture which proved to be durable and thus, that “still” characterizes the Middle East.

Brown argues that his utilization of the term “game” is not intended to develop a contribution to the game theory scholarship; rather he uses it for the sake of greater objectivity in treating diplomatic history. He contends that while elite structure and boundaries can be subject to change over time; interaction patterns or rules of the game in international relations remain the same. These rules, according to Brown bring explanatory power to his theory and he aims to justify these rules by way of placing them in the context of specific diplomatic events.⁸⁵

Brown specifies seven rules for the Eastern Question Game; and by way of historical evidence argues that these rules are still intact even if the Eastern Question Game was subject to major changes over time.

The most striking feature of these seven rules is that; they are specified in a way to first; justify Brown’s argument with the durability of the Eastern Question; and second; to make the argument able to cover all aspects of Middle East politics; from domestic politics to foreign policy; from elite change to the changes in world view. Thus, Brown’s model is a highly adaptive one; the behind the scenes meddling never ceases to be present; changes in the economic and political systems of middle Eastern states have minimal impact on the rules of the game. Even when Brown accepts that there has taken place a change in the basic parameters of the game; i.e. transition from multilateral great power politics to superpower bilateralism; he is keen to find a similar pattern of redistribution of power in history.

⁸⁵ Ibid., pp.13- 16.

3.2 Realism and Its Modifications

On the other end of the spectrum were systemic/neo-realist explanations brought to the fore in order to explain the Middle East politics. Focusing on the third image analyses, (neo) realist arguments claimed that it was the very anarchy that created a conflict-ridden Middle East. The balancing processes among states of the region, regardless of their respective relations with their societies, were the basic methodological premises to start with while explaining the politics of the region.

In doing so, they would keep the rules of the microeconomic analyses and thus would separate domestic components of the state from its international appearance and would focus only on material capabilities functioning under rules of anarchy. Such analyses would not differentiate between "states" who are in "the game". Thus for them a balance of power would work for the Middle East as well; state security interests and policies would be produced by "states" responding to the anarchy in the system. In that view, Middle Eastern states would be merely responding to the rules of the anarchy and the balance of power system; would act as "billiard balls".

In suggesting alternatives to such systemic theories; not only to neo-realism but to other systemic theories such as World Systems Theory and to Marxist readings of international relations as well; some scholars underlined the need to employ politics of culture (as different from essentialist or primordialists) and identity in shaping foreign policy in the Middle East region. Whether stated explicitly or implicitly; these works utilized teachings of Constructivism in the international relations.

Alexander Wendt in his famous article argues that self-help and power politics do not follow either logically or causally from anarchy. According to him, if today we find ourselves entrapped in a self-help

world, this is due to process, not structure.⁸⁶ While concluding to his motto; *anarchy is what states make of it*, he says [emphasis original]:

there is no 'logic' of anarchy apart from the practices that create and instantiate one structure of identities and interests rather than another, structure has no existence or causal powers apart from process. Self- help and power politics are institutions, not essential features of anarchy.⁸⁷

The micro-economic analogies of neo-realism which drives on the relative-gain interested, profit-seeking actors; is questioned by constructivists while seeking answers to the qualification of the relationship between structure and process. Wendt asks:

Should they [systemic theories of international relations] be based exclusively on 'microeconomic' analogies in which identities and interests are exogenously given by structure and process is reduced to interactions within those parameters? Or should they also be based on 'sociological' and 'social psychological' analogies in which identities and interests and therefore the meaning of structure are endogenous to process? Should a behavioral – individualism or a cognitive- constructivism be the basis for systemic theories of world politics?⁸⁸

3.2.1 Walt's Explicit Modified Realism

Stephen Walt's 1987 book, *The Origins of Alliances* is one of the earliest attempts that combine IR scholarship with the Middle East. On the other hand, Walt explicitly states that "the book is primarily an exercise in international relations theory, not Middle East studies."⁸⁹ Despite this, the fact that the testing ground for Walt's "balance of threats" theory is Middle East makes the study peculiar. It is not the case that the theory is derived from Walt's study of Middle Eastern alliance patterns though; rather Walt develops a theory which he sees best evidenced through a study of Middle Eastern alliance patterns.

⁸⁶ Wendt, "Anarchy is What States Make of It", p. 394

⁸⁷ Ibid.

⁸⁸ Ibid., p. 409

⁸⁹ Stephen Walt, *Origins of Alliances*, op.cit., p.15.

Walt gives four reasons for his choice of Middle East as a testing ground.

The first reason is explained as Middle East's strategic importance which is why according to Walt superpowers devoted much effort to acquiring and supporting allies in the region and took the risk of superpower confrontation.⁹⁰ The second reason according to Walt is the shifts in Middle East states' alliance commitments throughout the post-war period due to changes in their internal and external circumstances.

For the second reason he links the fertile character of the region that provide huge number of cases for study of alliances there to the clause that the region is more turbulent than other regions.⁹¹

The third reason for his choice, and the most important factor for Walt, is because Middle East provides a strong test of familiar hypotheses. He argues that:

Because most propositions about alliance formation (or international relations theory in general, for that matter) have been derived from the history of the European great power system, it is especially appropriate to examine their utility in predicting the behavior of states that are neither European nor great powers. Moreover, many of these regimes are relatively young and lack the diplomatic experience and traditions of the European great powers. Thus, if familiar hypotheses apply to this region as well, that is strong testimony to their explanatory power.⁹²

Although it seems initially that Walt raises the question of ethnocentrism/ Eurocentrism in IR theory and Middle East studies, his last sentence in the quoted paragraph above, and the overall

⁹⁰ In the footnotes Walt gives evidence from Kissinger to Nixon who argues for the strategic importance of the region, as well as references to arms expenditures spent for Middle East.

⁹¹ Stephen M. Walt, *The Origins of Alliances* (Ithaca: Cornell University Press, 1987), p.13.

⁹² *Ibid.*, pp. 13- 14.

framework of the study gives solid evidence that he has no intention to question those premises. Walt works in a strictly superpower context and thus has no intention to question Eurocentric foundations of IR theory.

The fourth reason for Walt's choice is that the Middle East has been swept by intense ideological rivalry, major shifts in relative power and significant superpower involvement throughout the period he chooses to analyze. For all these reasons, Walt believes that Middle East is the best pick to test alliance theories of neorealist IR theory. On the other hand, Walt also gives reference to the arguments of Middle East's uniqueness; but he thinks that even if it so; the same uniqueness could be argued for any other region as well.

By way of testing balance of threat theory in the Middle East, Walt also argues that he was forced to provide "the only complete account of postwar alliance diplomacy in the Middle East"⁹³ as he saw no comprehensive and reliable diplomatic history of the Middle East available.

Walt develops his balance of threat theory over the balance of power theory. Rather than questioning overall framework of realist/ neo-realist IR theory; he problematizes explanatory power of balance of power theory. This is why actually Walt has little to add to the study of Middle East from an IR perspective. He might have much to tell to the superpowers of the time though. According to Walt, superpowers often overestimate bandwagoning tendencies while undermine balancing. For Walt, small states in the region are more likely to balance than bandwagon.⁹⁴ As was noted previously, he takes the part of the overall theory and tries to come up with a concept which according to him would have better explanatory/ problem-solving capacity. The balance

⁹³ Walt, *Origins of Alliances*, op.cit., p.xi.

⁹⁴ *Ibid.*, pp. 28- 31.

of threat theory, unlike balance of power theory claims that states do not balance against power, but against threats because of geographical proximity, power, and intentions of others. According to him, rather than bandwagoning, which he defines as a situation whereby states facing an external threat would ally with the source of threat; balancing, where states facing an external threat will align with others to oppose the states posing the threat is more common.

According to Walt, sources of threat are as follows: i) aggregate power; ii) geographic proximity; iii) offensive capability; iv) aggressive intentions.⁹⁵ In terms of his use of ideology as well; Walt's framework is not new to the previous studies of ideologies in the Middle East. He argues that in the alliance formation, ideologies do not have an independent impact and thus are secondary to state interests. In his words, "security considerations are likely to take precedence and ideologically based alliances are not likely to survive when pragmatic interests intrude."⁹⁶

According to Douglas J. Macdonald, the sections on the impact of ideologies can be considered one of the weakest links in Walt's study.⁹⁷ According to him, Walt underestimates the role of ideology in alignment patterns, especially on the part of superpowers. Also he argues, Walt employs such a rigid definition on the impact of ideology that one would not be able to find anywhere, not least in the Middle East.

An example which does not suite Walt's formulation on the impact of ideology could be American- Israeli alliance; or the "special relation" between the two countries. If security considerations are likely to take precedence and ideologically based alliances are not likely to survive

⁹⁵ Ibid., pp. 21- 25.

⁹⁶ Ibid., p. 38.

⁹⁷ See, Douglas J. Macdonald, "Review: the Origins of Alliances by Stephen Walt" in *The Journal of Politics* Vol. 51, No: 3 (August, 1989), pp.795- 798, p.796.

when pragmatic interests intrude as Walt argues, one would have difficulty to explain post- 1967 alliance pattern between the U.S. and Israel.

As Macdonald argues though, branding Israel as “the only democracy in its region” has been a profound ground for justification of the U.S.- Israeli alignment. Actually, the recent controversial article by Stephen Walt and John Mearsheimer in the *London Review of Books* accepts that U.S. - Israeli alignment continues due to ideological factors at play; which is in aberration with Walt’s idea of unviable alliance pattern.⁹⁸

3.2.2 Hansen’s Outright Realism: a Model for Post Cold War

Another attempt at modified (neo) realist reading of Middle Eastern politics is by Birthe Hansen.⁹⁹ Like Walt, Hansen is essentially preoccupied with furthering explanatory capabilities of neorealist IR theory. While Walt aims to heal a specific concept within the neorealist structure, Hansen is aiming at explaining the world order after the end of Cold War.

As with Walt, Hansen argues that the model of unipolarity is not specifically tailored for the Middle East alone, but as a wider explanatory framework for understanding post- Cold War order. Hansen’s main preoccupation in the theoretical grounds of her work is “to present a theoretical model for unipolarity and to explain the development in Middle Eastern international politics from the end of Cold War in 1989¹⁰⁰ to 1998 by means of that model.”¹⁰¹

⁹⁸ Stephen Walt and John Mearsheimer, “The Israel Lobby” in *London Review of Books*, Vol. 28 No. 6, (March, 2006).

⁹⁹ Birthe Hansen, *Unipolarity and the Middle East* (Surrey: Curzon Press, 2000)

¹⁰⁰ According to Hansen the cold War ends not in January 1989 (Soviet withdrawal from Afghanistan) or in November 1989 (fall of Berlin Wall) but in

The basic drive for Hansen is her argument that a neorealist model for unipolarity is lacking at the face of transformation of world politics from bipolarity to unipolarity; thus, systemic change, in other words at the face of the alteration at the number of superpowers, apparently where the U.S. is considered the sole superpower in existence.¹⁰²

Contrary to those who would argue that the world is rather multipolar or characterized by hegemony, Hansen argues that Waltzian neorealist structural model is still the best framework to analyze international relations in the post- Cold War era. According to her, neorealist arguments for anarchy and functional similarity (states as like-units) where anarchical self- help condition rules, are valid for international relations analyses. She develops three concepts for analyzing self-help structure in a unipolar structural situation. Her model is based on the neorealist stratification of states into great powers and other states. As for her first concept, flocking¹⁰³, Hansen asserts that other states tend to flock around the unipole. Especially when security at stake, international tension forces states to take sides and the unipole emerges as the only option other states tend to flock around. They would have asymmetric alignment as their only choice and they would have to work hard to provide security for themselves which would result in symmetrical alignment and cooperation models.¹⁰⁴ While the superpower will

concentrate on avoiding potential challengers and check them when rising, economize with its resources , and be free to choose

September 1989, when Kremlin made concessions on strategic arms to the United States. See p. 17 and p.78.

¹⁰¹ Ibid., p.1.

¹⁰² Ibid., p. 2.

¹⁰³ According to a harsh critique of Hansen's work, flocking is no different than the concept of bandwagoning despite Hansen's counter argument. See, Naveed S. Sheikh, "Book Review" in *Cooperation and Conflict*, Vol: 37 No: 2, pp. 233- 236, p.235.

¹⁰⁴ Hansen, op.cit., pp.17-21.

its objectives (symmetrically) unchecked; it will, however, still be available as the (only) ultimate external backing and as its strategic interests, and it has to face the task of management in the context of conflicting interests.¹⁰⁵

Thus, for Hansen, the main problem that has to be explained in a modified neorealist framework is the ways in which systemic change has penetrated Middle Eastern politics.¹⁰⁶ In line with that argument, Hansen analysis the Middle East as an international subsystem. Her fundamental assumption is that systemic change implies altered relations of strength symmetrically as well as asymmetrically which cause different range of outcomes and patterns regarding conflict and cooperation among the units.¹⁰⁷ In her words:

The interaction between the Middle Eastern states is approached in light of the structural conditions, which are considered to *select* the strategies of units (states) as well as the outcomes of these strategies. Each unit always has two options: it may adopt or oppose, but in the long run the selection will favor adaptation.¹⁰⁸

After setting the framework as one of neorealist model of unipolarity where states are treated as like-units within a structural system; Hansen first justifies her model and then applies her model to the Middle Eastern context in seven chapters. Chapter 6 deals with the unification of Yemen, chapter 7 with Iraq's invasion of Kuwait, Chapter 8 with the formation of the international coalition, Chapter 9 with the end of the Lebanese Civil War, Chapter 10 with Operation Desert Storm, Chapter 11 with the Western Saharan cease-fire, chapter 12 with the Gaza- Jericho Accords and Chapter 13 with the Arab- Israeli peace process. Following these chapters are three concluding chapters where Hansen justifies her model in more general and systemic terms.

¹⁰⁵ Ibid, p.21.

¹⁰⁶ Ibid., p. 3.

¹⁰⁷ Ibid., p.12.

¹⁰⁸ Ibid., p.4. Emphasis original.

According to Hansen, states such as Syria, who read the international environment "right" were among the winners as with the end of civil war in Lebanon is tied to its position in the 1st Gulf War, while Iraq who miscalculated superpower's commitment to the region were amongst losers. Unification of Yemen was the mere single option at the face of dual weakening and disappearance of the Soviet Union. According to Hansen same dealignment (loss of Soviet support) was the basic reason behind the ceasefire in West Sahara between Morocco, Algeria and Libya. Gaza- Jericho accord were available only when bipolarity's zero sum game disappeared from the scene and it was only when unipolar impact was present did it become possible to lead negotiations for Arab-Israeli peace process.

Despite this neat picture Hansen draws; critics argue that Hansen disregards some material and ideational factors at hand in her analysis. Robert Freedman argues that in the case of Western Sahara it was the bloody civil war in Algeria, rather than the loss of Soviet support, that lied behind the settlement.¹⁰⁹ For Sheikh, Hansen does not contemplate on how "other states" manipulated "superpowers" as was the case between Nasser's Egypt and Soviet Union as well as omitting vital cases such as violation of the UN Charter during the Gulf War, how regional security arrangements were discouraged, how Israel's occupation was proscribed while Iraq's demilitarization was insisted upon, and how the US allowed Saddam Hussein's crash on Kurdish and Shi'ite populations in order to maintain a territorial integrity. Also on ethical grounds, he accuses Hansen of turning a blind eye on the plight of Iraqi population under UN sanctions and resignation of two UN program coordinators.¹¹⁰

¹⁰⁹ Robert O. Freedman, "Review Article" in *The American Political Science Review*, Vol. 96, No. 1, Mar., 2002, pp.263-264, p.263.

¹¹⁰ Sheikh, op.cit., p.235.

While she accepts that the Middle East is characterized by a combination of many specific attributes, from religion to border disputes and ethnic conflicts, as well of colonial past; her discussions in above chapters have scant evidence on the impact of these factors due to her strictly structural framework.

In sum, Hansen's study can be considered as one of the most explicit attempts at theoretically informed Middle East analyses. On the other hand, in addition to above criticisms one has to be aware of the fact that Hansen treats the region through an instrumentalist methodology. She employs the region in order to confirm a hypothesis and ignores certain aspects of the context when they do not suit with the overall framework. Still, her focus on transformation from bi- to unipolarity is a common argument employed by IR community and she deserves points for at least trying to theorize those first.

3.3 Foreign Policy Analysis

3.3.1 Hinnebusch and Ehteshami's Eclectic "Modified Realism"

One example to the modified realist approach is an edited volume by Raymond Hinnebusch and Anoushiravan Ehteshami.¹¹¹ The volume is product of a workshop convened at the University of St. Andrews by the contributors. The editors explain in the preface to the volume that the main task of the book project was to develop "an analytical framework that would incorporate enough of a consensus on the key variables to allow systemic comparison of the country cases while avoiding imposition of an overly rigid and artificial symmetry."¹¹² Presented in the book in Hinnebusch's introductory chapter, the

¹¹¹ Raymond Hinnebusch and Anoushiravan Ehteshami (eds.), *The Foreign Policies of Middle East States* (Boulder: Lynne Rienner Publishers, 2002)

¹¹² *Ibid.*, p. vii.

framework reached through a consensus is described as a "modified realism".¹¹³ According to Volbjorn on the other hand, it could have been more accurate to say that the analytical framework is a modified form of almost all major currents within mainstream IR.¹¹⁴ The book assumes that in the Middle East the state is the main actor in foreign policy and that state elites have an interest in maximizing the autonomy and security of the state. It agrees to the realist claim that Middle East state system results in anarchy as a built-in feature. Hinnebusch argues:

The Middle East is one of the regional subsystems where this anarchy appears most in evidence: It holds two of the world's most durable and intense conflict centers, the Arab- Israeli and the Gulf arenas; its states are still contesting borders and rank among themselves; and there is not a single one that does not feel threatened by one or more of its neighbors.¹¹⁵

In line with Realism's another basic argument, the book also accepts that states utilize "reason of state" to counter threats through power accumulation and balancing, where balancing is accepted as a key to regional order.

¹¹³ Raymond Hinnebusch develops basic arguments of this chapter into a comprehensive book he has published a year later. However, in his *The International Politics of the Middle East* (Manchester: Manchester University Press, 2003) he refrains from utilizing the term "modified realism."

¹¹⁴ Morten Valbjorn, "The Meeting of the Twain: Bridging the Gap between International Relations and Middle East Studies" in *Cooperation and Conflict* 38 (2), 2003, pp.163- 173, p. 167.

¹¹⁵ Raymond Hinnebusch, "Introduction: The Analytical Framework" in Hinnebusch and Ehteshami, *op.cit.*, p.1 For development of the term "regional subsystems," see Bassam Tibi, *Conflict and War in the Middle East: From Interstate War to New Security*, 2nd Edition (London: Macmillan, 1998), pp. 30-42. For implications of the term in the Middle East see Pinar Bilgin, *Regional Security in the Middle East: A Critical Perspective* (London and New York: Routledge Curzon, 2005), pp.75- 88. Also see, F. Gregory Gause III, "Systemic Approaches to Middle East International Relations", *The International Studies Review* Vol. 1, No. 1, (May 1999), pp.11- 31, especially pp.13- 15; and William R. Thompson, "Delienating Regional Subsystems: Visit Networks and the Middle Eastern Case," *International Journal of Middle East Studies* Vol:13, No:2, (May, 1981), pp. 213- 235.

Expecting a truly realist account however, would not meet expectations of the reader as Hinnebusch outlines a number of “liabilities” of the realist framework; which justifies the need to “modify” it. As was noted before, this commonplace and, in on sense, inevitable eclecticism is utilized in the individual chapters throughout the book.

According to Hinnebusch, “neorealism¹¹⁶ holds that systemic insecurity induces uniform patterns of behavior, notably balancing against threats¹¹⁷, but this is merely typical to the extent that a state system of relatively sovereign unified states is consolidated.” For Hinnebusch though, as the Middle Eastern state system is not yet consolidated, the dynamics of systemic level would have less effect on state behavior than realism expects while other levels, addressed by rival theories, would have more.

Emphasizing liabilities of realist paradigm in explaining foreign policies of Middle Eastern states, Hinnebusch then utilizes a number of theories, from structural/ Marxist theories to constructivism and neoliberalism, in order to develop a framework of explanation. For each theory he also outlines a number of discrepancies which would fall short of fitting the Middle East case.

For Hinnebusch, foreign policies of Middle East states are shaped around three conceptually distinct environments dependent on the way their leaders cultivate conflicting pressure emanating from these. The first is the domestic level, the second the regional systemic level and the third the global level. For the global level, Hinnebusch relies on structural accounts of international relations where core- periphery

¹¹⁶ It is interesting that the author switches from the use of term “realism” to neorealism without any prior notice.

¹¹⁷ It is worth noting that although Hinnebusch utilizes “balance of threats” as if it is part of conventional neorealist terminology, the concept was developed in Stephen Walt’s influential work *The Origins of Alliances* (Ithaca: Cornell University Press, 1987) which is a modification to the “balance of power” theory.

relations are seen as a basic feature of Middle Eastern states. As for the domestic level he relies on theories of state building; at times reminding the reader of historical sociology's state conception. The book is very much organized around Hinnebusch's foreign policy analyses structure which consists of looking at 1-Foreign Policy Determinants (core- periphery relations, state formation and foreign policy making) 2-Foreign policy making (actors and effective processes over decisions) 3- Foreign Policy Behavior (historical evolution of policy making and their impact on the overall regional system).

Regarding foreign policy determinants, Hinnebusch argues that world system had differing impacts on the foreign policies of local states in the Middle East. He argues that:

1) Where the interest of local regimes overlap with those of core patrons, reason of state and alliance with a great power coincide and states tend to "bandwagon" with their global core patron to contain local threats. 2) On the other hand, penetration generates resistance and where nationalist movements come to power, nationalist regimes have sought to organize a regional coalition to balance against external powers. 3) However, this is only possible under favorable conditions: when the great powers are divided (as in the Cold War)- and hegemonic intervention is thus deterred- and when the region is relatively united (the Nasserite 1950s and 1960s) against the outside, the conditions for regional autonomy may be better than in the reverse case (before 1945; since 1990).¹¹⁸

Another "unique" factor that complicates foreign policy making is defined as the uneasy relation of identity and sovereignty in the Middle East state system. The reason that lies behind this phenomenon is seen as the unconsolidated system of nation states in the region due to profound flaws originating in its largely external imposition: incongruent, arbitrary borders and the ill fit between states and national identities. According to Hinnebusch this uniqueness averts Middle Eastern state from fitting the assumed realist state model

¹¹⁸ Hinnebusch, "Introduction", op.cit., p.6.

assumes. Thus, in Hinnebusch's words¹¹⁹, "the Arab world, in particular, is well less represented by realism's impenetrable "billiard balls" than (in Paul Noble's words¹²⁰) a set of interconnected organisms separated only by porous membranes." Thus, the aforementioned ill fit leads to contestation of loyalty to the individual states by substate and suprastate identities. Thus, "the resultant embedding of the state system in a matrix of fluid multiple identities means that the 'national interest' that realism assumes underlies foreign policy is problematic and contested."¹²¹ Hinnebusch argues that this poor fit lies behind Iran- Iraq conflict and Turkish- Syrian confrontation as the poor fit results in a built-in irredentism in the Middle East. Similarly, he argues that Israeli- Palestinian conflict and the prolonged crises in Lebanon carry elements of this phenomenon.¹²²

Hinnebusch's discussion of the suprastate identity as a consequence of the same poor fit carries elements of constructivist discussion of identities in the Middle East. According to him, while irredentism may be considered a common element in much of the Third World, suprastate identities are unique to the Middle East region; and especially in its Arab core. He gives references to previous work that deals with the phenomenon and argues that those accounts which take identities as constructed rather than a given better explain the Middle Eastern reality as it relates to discussions of Pan- Arabism as a suprastate identity.

To the extent that it relates to the purposes of this chapter, Hinnebusch argues that while Pan-Arabism continues to affect foreign policy making in the Middle East, at times replaced by pan- Islamism, as policy

¹¹⁹ Ibid., p. 7.

¹²⁰ See Paul Noble, "The Arab System: Pressures, Constraints, and Opportunities" in Baghat Korany and Ali E. Hillal Dessouki, *the Foreign Policies of Arab States: The Challenge of Change* (Boulder, CO: Westview Press, 1991), p.57.

¹²¹ Hinnebusch, "Introduction", op.cit., p.7.

¹²² Ibid., pp.7-8.

makers must “still disguise, justify, or even modify the pure pursuit of reason of state”,¹²³ constructivist readings of the end of Pan-Arabism ignore the extent to which the decline of Pan-Arabism was rooted in the power struggles unleashed by 1967 Arab- Israeli and the two Gulf wars.¹²⁴

As with pluralist view of IR, Hinnebusch argues that as replacing security concerns would only be possible when threat declines. As for regional balancing, Hinnebusch believes that balancing in the Middle East state system has been effective even at the height of Pan-Arabism.¹²⁵ He argues that as long as irredentist claims leads to inter and intra- state conflict, “the spread of zones of peace will not rewrite the dominant realist rules of Middle East international politics.”¹²⁶

Overall, Hinnebusch develops an analytical framework where he tries to measure explanatory capabilities of rivaling IR theories as they relate to the Middle Eastern cases. Although his interest with application of IR theory to the region should be appreciated; the overall effort is highly eclectic; and the overall attitude of “modified realism” only appreciates rival theories to the extent that they can add up to realist readings of the region.

As for the individual chapters on region’s states the above mentioned analytical framework is dominant. While some chapters reflect on theory to a greater extent, some others are merely dealing within the framework Hinnebusch provides.

3.4 Constructivism

¹²³ Ibid., p.10.

¹²⁴ Ibid., p.9.

¹²⁵ Ibid., p.19.

¹²⁶ Ibid., p. 22.

In order to set an introductory framework; I will initially utilize analyses of Katzenstein's volume¹²⁷ which focuses on the policy aspect of constructivist analyses; a more social-institutional; environment based account. The reason for this choice can be justified that this volume; although later criticized from reflectivist IR theorists for failing to break up with rationalism's premises; was the very first book I was exposed to a framework that was critical of neo(realist) analyses. The context driven by Katzenstein is important in two ways: First; it gives the background paradigm to understand how the basic constructivist analyses are applied to policy arena and second, that it is the bases on which Michael Barnett in his article in the same volume, draws conclusions regarding the Middle East.

Despite the fact that the numbers of books which concentrate on sociological, identity based explanations of foreign policy are rare, there are valuable volumes one should pay attention to.¹²⁸

Katzenstein's volume aims at offering a sociological perspective on the politics of national security and argues that security interests are defined by actors who respond to cultural factors.¹²⁹ Through arguing that Kenneth Waltz in his *Theory of International Politics*¹³⁰ privileges systemic effects on national policy and sidesteps the motivations that inform policy¹³¹, *The Culture of National Security* focuses on first, the

¹²⁷ Peter J. Katzenstein (ed.), *The Culture of National Security: Norms and Identity in World Politics* (New York: Columbia University Press, 1996)

¹²⁸ See, Katzenstein (ed.), *The Culture of National Security*, Jongsuk Chay (ed.), *Culture and International Relations* (New York: Praeger, 1990), Bahgat Korany, Paul Noble and Rex Brynen (eds.), *The Many Faces of National Security in the Arab World* (New York: St. Martin's Press, 1993) and Shibley Telhami and Michael Barnett (eds.) *Identity and Foreign Policy in the Middle East* (Ithaca: Cornell University Press, 2002)

¹²⁹ Peter J. Katzenstein, "Introduction: Alternative Perspectives on National Security" in Katzenstein (ed.), *The Culture of National Security*, p. 3

¹³⁰ Kenneth N. Waltz, *Theory of International Politics* (Reading, Mass.: Addison-Wesley, 1979).

¹³¹ Katzenstein, "Introduction..", p. 13.

cultural- institutional context of policy and second, on the constructed identity of states, governments and other political actors.¹³² According to this view, security environments in which states are embedded are in important part cultural and institutional rather than just material.¹³³ As a reflection of this argument to the Middle East, it can be argued that the inter-state relations in the region cannot be explained merely by balance of power mechanism as an imposition of anarchy but by a process where Arabism or the different forms of alliance making will be decisive in the making of the foreign policies.

An advance on the previous argument is portrayed as follows:

Cultural Environments affect not only the incentives for different kinds of state behaviour but also the basic character of states-what we call state "identity". This contrasts with the prevailing assumption, made by Neo-realists and neo-liberals alike, that the defining actor properties are intrinsic to states, that is, "essential" to actors (rather than socially contingent), and exogenous to the environment¹³⁴

They underline that although Waltz allows for "socialization" and "imitation" processes; in so doing he thinks the fundamental identity of states as exogenous to the states' environments, global or domestic; the shaping of the behaviours of pre-given actors. For them however, three effects of environments can be distinguished: "First, environments might affect only the *behaviour* of actors. Second, they might affect the contingent *properties* of actors (identities, interests, and capabilities). Finally, environments might affect the *existence* of actors altogether."¹³⁵

¹³² Ibid., p.4.

¹³³ Ronald L. Jepperson, Alexander Wendt and Peter J. Katzenstein, "Norms, Identity, and Culture in National Security" in Katzenstein (ed.), *The Culture of National Security*, p.33.

¹³⁴ Ibid.

¹³⁵ Ibid., p. 41.

Thus; an interacting model whereby four variables; environmental structure, identity, interests and policy is reached.¹³⁶ These models remind one on the other hand of structuration, dual reflexivity and spatial trinity of neo-Weberian Historical Sociology¹³⁷ and the scholars of Middle East have applied these theoretical models to the region in varying degrees.

This part of the chapter will look at those works which are *different* from the conventional neo-realist paradigm. I group such works into two: The modifiers and the challengers. However, both the modifiers and challengers are self-proclaimed modifiers or challengers. After presenting their respective arguments I will try to question to what extent they modify or pose a challenge to the conventional IR paradigm; notwithstanding their contributions.

In his contribution to Katzenstein's volume, Michael Barnett focuses on how threats are constructed and the choice of an alliance partner is made in the Middle East. He dwells into three cases: The construction of the Baghdad Pact, the end of pan-Arabism and the US-Israeli relations in order to apply his theoretical model.¹³⁸

Barnett, in response to the realist view of the state's strategic calculus where the identification of the threat and the determination of whether and with whom to ally in response to that threat are parsimoniously and predictably propelled by power politics and systemic pressures ; argues that material factors and threats to the state's security generate the definition of the threat, and the decision to construct an external

¹³⁶ Ibid., p. 53.

¹³⁷ John M. Hobson, *The Wealth of States: A Comparative Sociology of International Economic and Political Change*, (Cambridge: Cambridge University Press, 1997), p. 2 and p. 14

¹³⁸ Michael N. Barnett, " Identity and Alliances in the Middle East" in Katzenstein(ed.), *The Culture of National Security*, op.cit., pp. 400-447. Also see Michael Barnett, "Culture, Strategy and Foreign Policy Change: Israel's Road to Oslo", *European Journal of International Relations*, Vol. 5, No.1, (1999).

alignment (as opposed to a strategy of internal mobilization) and with whom is dependent on a rational calculation of costs and benefits that drive primarily from material factors and the state's relative military power vis a vis potential and immediate threats. In general, the neorealist approach to alliance formation is quite insistent that material factors dominate the definition of, and the adopted response to, that threat.¹³⁹

He, in contrast, claims that state identity offers theoretical leverage over the issue of the construction of the threat and the choice of the alliance partner. Further he argues, it is the politics of identity rather than the logic of anarchy that often provides a better understanding of which states are viewed as a potential or immediate threat to the state's security.¹⁴⁰ To achieve that end he examines various episodes in inter-Arab and U.S.- Israeli relations: according to him, in the early years of Arab states system , Arab nationalism guided Arab states to identify both with whom they should "naturally" [emphasis original] associate and the threat to Arab states; and also this common identity and threat created the desire for certain normative and institutional arrangements to govern inter-Arab security politics that were reflective of their self-understanding of being Arab states.¹⁴¹

From that point on Barnett argues that a shift away from the materialist determinism of structural realism is possible. For example, while wealth and security might have been advanced by alliances with the West and accommodation with Israel, Arab identity precluded these and prioritized independence from and unity against these non-Arab actors.¹⁴²

¹³⁹ Barnett, " Identity and Alliances..."op.cit., p. 401.

¹⁴⁰ Ibid.

¹⁴¹ Ibid., p. 402.

¹⁴² Raymond Hinnebusch, " Review Article: Identity in International Relations: Constructivism versus Materialism, and the Case of the Middle East", *The Review of International Affairs*, Vol. 3, No. 2, (Winter 2003), p. 360.

A central feature to his argument; Pan-Arabism, according to him holds that Arab states had an obligation to protect Arabs wherever they resided and to work toward political unification while the Arab states system was nominally organized around sovereignty.¹⁴³ That is the point of departure from where Barnett dismisses Stephan Walt's¹⁴⁴ "balance of threat" conceptualization where Walt modifies Kenneth Waltz's account of alliance formation by recognizing that states balance not against power but rather against threats. According to Barnett; Walt's historical observations on identification of threats are inconsistent with his commitment to materialism that directs Walt to downplay ideational factors to the level of ideology and thus parasitic on the material: "an attempt and need to minimize causal force of identity."¹⁴⁵

Thus, the impact of the Arab identity over the definition of the threat and the understanding of the Arab nationalism as the belief that Arab states have shared identities and interests through which the Arab nation enveloped and allocated a common Arab identity to the segmented Arab states will be able to explain certain episodes in the Middle East.¹⁴⁶

In that respect the announcement of a strategic alliance between Turkey and Iraq in 1955; the Baghdad Pact was not welcome in the Arab World. According to Barnett; the pact highlighted a number of key issues concerning the relationship between identity and strategic behavior that run counter to neorealist arguments:

¹⁴³ Barnett, "Identity and the Alliances.." op.cit., p. 404.

¹⁴⁴ Stephen M. Walt, *The Origins of Alliances* (Ithaca: Cornell University Press, 1987).

¹⁴⁵ Barnett, pp.403-406.

¹⁴⁶ Ibid., pp. 413-414.

First, the Arab nation's definition of the threat was directly linked to the Arab identity; Arab nationalism partially emerged in response to intrusions from the Ottoman Empire and the West. In short, the definition of intent, of who is considered friend and foe, is better determined by the politics of identity than by the logic of anarchy. Second, the Baghdad Pact represented a challenge not to the balance of power per se but to Arab nationalism and its emerging and contested norms. The pact unleashed a debate among Arab states concerning what behaviour was and was not proper for *Arab* states, that is, how Arab states were to enact their identity. Third, in the ensuing debate Arab states duelled with symbols and images, but not militaries... In short, rivalry was driven by presentational, not military, politics.¹⁴⁷

As with the U.S.- Israeli relations on the other hand, Barnett dismisses approaches which prioritize either systemic or domestic forces over identity politics. He argues that, despite systemic arguments; U.S. support for Israel has continued against the backdrop of changing security circumstances, distributions in the balance of power, and the place of Israel in U.S. strategic doctrine.¹⁴⁸ According to him, another view which focuses on the primacy of domestic politics; electoral politics and pressure/ lobby groups, and argues that those forces cause American leaders to adopt consistently a pro-Israel policy even when strategic logic suggests a more "balanced" approach if not a pro-Arab policy.¹⁴⁹ For Barnett; this second view would have some explanatory power over the level of U.S. strategic assistance; it does not provide an adequate explanation of its very existence. Barnett offers identity politics as a third paradigm in reading U.S. - Israeli relations. For him, although domestic and systemic pressures affected the level of U.S. support for Israel, it is the existence of a shared identity and transnational values that is the foundation of that relationship and the common mottos like "the only democracy in the Middle East" and "shared values and principles" are crucial in determining the qualification of the special relationship between two states. That environment according to Barnett also has impacts over the policy

¹⁴⁷ Ibid., p. 421.

¹⁴⁸ Ibid., pp. 432-433.

¹⁴⁹ Mohammed Ayoob, "The Security Problematique of the third World," *World Politics* 43, No.2 (1991), pp. 257-83.

choices respective states prefer. For example in discussions over "Greater Israel" and a democratic-secular Israel in the aftermath of the *Intifadah*, this very identity politics have had impacts of paramount importance¹⁵⁰. Also in identification of common threats, notably 'Islamic fundamentalism' in this case was crucial. ¹⁵¹

Among modifiers on the other hand may be counted Shibley Telhami, Peter Noble¹⁵², F. Gregory Gause III.¹⁵³ and Raymond Hinnebusch.¹⁵⁴ Those scholars at some levels prioritize systemic forces and at others ideational forces. They mostly recognize the importance of the play of non-materialistic forces such as identity and culture and at some points would bear a sociological tone; however, the primacy of power politics, the importance of imposed structures such as anarchy and the balance of power mechanism is still of essential importance. Thus, as they are aware of the inadequacy of structural realism alone to provide a sound account; they seek to embrace some ideational perspective into a neorealist reading of Middle East politics. Their contribution through a critique of each other would enrich the field.¹⁵⁵ Thus, I name them as modifiers.

¹⁵⁰ Michael Barnett, "The Israeli Identity and the Peace Process: Re/creating the Un/thinkable" in Telhami and Barnett (eds.), *Identity and Foreign Policy in the Middle East*, pp.58-87.

¹⁵¹ Barnett, "Identity and the Alliances..", op.cit., pp. 433-444.

¹⁵² Paul c. Noble, " The Arab System: Pressures, Constraints and Opportunities," in Bahgat Korany and Ali E. Hillal Dessouki (eds.), ;*The Foreign Policies of Arab States*, 2nd edition (Boulder: Westview Press, 1991)

¹⁵³ F. Gregory Gause, III "Theory and System in Understanding Middle East International Politics: Rereading Paul Noble's ' The Arab System: Pressures, Constraints and Opportunities', paper prepared for presentation at 'Noble fest 2002', June 18-20, Montreal. See web page: <http://www.uvm.edu/~fgause/paul.htm> (reached: November 2004)

¹⁵⁴ Raymond Hinnebusch and Anoushiravan Ehteshami (eds.), *The Foreign Policies of MiddleEast States* (Boulder: Lynne Rienner, 2002) and Hinnebusch, "Review Article:" op.cit.

¹⁵⁵ For example, Hinnebusch's critique of the arguments on Jordanian identity in Barnett and Telhami's volume leads the way for questioning the given identities

3.4.1 Michael Barnett's Dialogues in Regional Order:

Michael Barnett has been one of those unique scholars who have developed an interest in both IR theory and Middle East politics. His 1998 study has been a reference point in studies that deal with how IR theory meets Middle East analysis. His 1998 study¹⁵⁶ not only merges IR theory with Middle East expertise, but also departs from earlier work by adopting a non-realist and non-structural framework.¹⁵⁷ His writing has taken constructivist venue as its starting point. Despite all the attention paid to the role of identities in Middle East analysis; his contribution lies in the fact that he has ventured in an effort to study identity issues in the Middle East through Constructivist IR theory. He has tried to establish a systematic framework to make sense of hitherto eclectic deployment of identity as a factor in Middle Eastern/ inter-Arab politics.

Barnett's book starts with drawing a picture of realist dominant accounts of Middle East international relations. He accedes that Realism's defining and cyclical narrative seems to capture Arab politics.

and accommodation into that. While Barnett in another venue comes closer to this point; the slight difference is emphasized effectively by Hinnebusch.

¹⁵⁶ Michael Barnett, *Dialogues in Arab Politics: Negotiations in Regional Order*, (Ithaca and London: Cornell University Press, 1998). Also see Shibley Telhami and Michael Barnett (eds.) *Identity and Foreign Policy in the Middle East* (Ithaca: Cornell University Press, 2002), Chapter 1 and Michael N. Barnett, "Identity and Alliances in the Middle East" in Peter J. Katzenstein (ed.), *The Culture of National Security: Norms and Identity in World Politics* (New York: Columbia University Press, 1996), pp. 400-447. For a critique of Barnett's work see, Raymond Hinnebusch, "Review Article: Identity in International Relations: Constructivism versus Materialism, and the Case of the Middle East", *The Review of International Affairs*, Vol. 3, No. 2, (Winter 2003), p. 360 and Pinar Bilgin, op.cit., pp.5 -6.

¹⁵⁷ For a review of constructivist turn in International Relations see, Stefano Guzzini and Anna Leander (eds.), *Constructivism in International Relations: Alexander Wendt and his critics*, (London: Routledge, 2006). For a critical view of differences between constructivism and realism see, Steve Smith, "Wendt's World", *Review of International Studies*, Vol.26, No: 1, (2000), pp.151- 163.

¹⁵⁸ He argues that this dominance resonates in the studies that covers the region and on our understanding of Arab politics.¹⁵⁹ Barnett argues, however, that realism has a difficult time addressing some fundamental features of Arab politics. Barnett argues that, the reality on ground in Arab politics does not match with realism's reliance on hegemonies, balances of power, and alliance patterns. He states that:

Realists would expect that in such a high-treat environment Arab states would attempt to increase their security against each other by accumulating arms and forming military alliances. But where are the arms races? Curiously Arab states have shunned any noticeable effort to enhance their security by amassing weapons.¹⁶⁰

According to Barnett, while realist frameworks insisted upon military accumulation to overcome security concerns; in inter- Arab politics security was not tied to material power or military arsenals but to presentational politics, in other words to impression management.¹⁶¹ He points to the anomaly that very few narratives of Arab politics look to realism's basic canons in discussing foreign policy issues while Arab politics is associated with realism. Most of these studies focus on how Arab nationalism played a central role in shaping policy concerns.¹⁶²

Thus, we have an awkward situation at hand where realist accounts have severe theoretical deficiencies in explaining Arab politics, many narratives of Arab politics defy realist categories but neither enough attention is paid to deficiencies in realist accounts nor can IR and MES community refrain from reading narratives that defy these realist

¹⁵⁸ Barnett, *Dialogues in Arab Politics*, op.cit., p.1.

¹⁵⁹ The last point is crucial as Barnett raises the question of constitutive features of thinking about a region though he does not elaborate on that aspect in detail.

¹⁶⁰ Ibid.

¹⁶¹ Ibid., p.2.

¹⁶² Ibid., p.4.

canons without perceiving them as advancing and supporting a realist imagination of the region.¹⁶³

Thus, Barnett takes the constructivist path to overcome the anomaly. He tries to give meaning to the normative context Arab politics is taking place within and understand how states' identities and interests are shaped within that context as well as how regional order is maintained through social negotiations, coercion and consent. He argues by way of this path, the book will be able to:

reconceptualize the history of inter-Arab politics, approach the debate over the desired regional order as Arab states and societies did, understand why Arab states competed through symbolic means to establish the norms of Arabism, and recognize how and why those ongoing struggles over the desired regional order caused fragmentation in the Arab state system.¹⁶⁴

According to Barnett, the conditions that states function within are not given; they are rather products of a never-ending process of negotiation; which Barnett calls as "dialogues". Answers to questions such as whether to make peace with Israel, intensify relations with the West, how to deal with prospects on integration are found through processes where discussion among group members about the norms that are to guide their relations are triggered.

According to Barnett, such moments are when states become fixated on the norms that relate to regional order and their own identities. Barnett presents the creation of the League of Arab States in 1945, rumors that Jordan was considering relations with Israel in 1950, the 1995 Baghdad Pact, the Arab unity experiments of 1958 to 1963, the Arab summits of the mid- 1960s, the Khartoum meeting after the 1967

¹⁶³ Ibid., pp. 4-5.

¹⁶⁴ Ibid., p.5.

Arab- Israeli war, Camp David process, and the first Gulf War as moments where such dialogue took place.¹⁶⁵

Barnett's conceptualization of the game of Arab politics also differs from the conventional game theory frequently used in foreign policy analysis. While conventional game theory assumes that states are trying to maximize their relative gains in a given anarchical condition; Barnett argues that although defining the norms of Arabism was an exercise of power and a mechanism of social control, an alternative understanding of games entails thinking about them as normative structures. Thus, these normative structures are socially determined and therefore they restrict and guide what is acceptable, in other words, the rules of the game.¹⁶⁶

That being said, one should also take into account how Barnett explains the norms that he thinks matter most in the dialogue and game processes. In Barnett's words, "social processes, not social structures, produce norms." Thus agency in defining norms lies with the actors; "actors determine what the norms are. " Thus, competition in Arab politics was for defining the norms of Arabism, and parameters of legitimate action, not for relative gains. As such, threat perceptions were shaped primarily not by military arsenals of a certain state but by the impact of that state's lead in defining the norms of political life that would harm regime interests of another.¹⁶⁷

Accordingly, Barnett states that Nasser's power lied in his ability to shape norms of Arabism; not from Egypt's military capabilities just like United Arab Republic of 1958 was perceived as a threat by Iraq and Jordan not because of Egypt and Syria had accrued enough power in

¹⁶⁵ Ibid., pp.6- 7.

¹⁶⁶ Ibid., p.8.

¹⁶⁷ Ibid., p.7.

military terms but because the UAR had hijacked norms of Arabism and the ways to govern inter-Arab relations.¹⁶⁸

While the reader is not foreign to reading about strategic interactions between states; Barnett adds into the picture social interaction among Arab states. According to Barnett what makes these interactions social is

that Arab leaders were in a structural condition of mutual dependence: because of their shared Arab identity they determined the norms of Arabism collectively and could hardly declare a sovereign prerogative over such matters, were expected to honor those norms, and generally did so because of their desire for social approval and the recognition that they were Arab leaders in good standing.¹⁶⁹

As Barnett argues with the case of the concept of game in Arab politics; he thinks of the social situations not only limiting state's action but also defining and shaping identities and interests. Thus, along with material constraints and opportunities, he argues ideational constraints and opportunities are embedded into decision making processes where decision makers are not only responding but also producing the structural framework they function within.

Barnett claims that by embedding state action within a normative structure, he attempts to "blend *homo economicus* with *homo sociologicus*; if economic humans are calculating, utility-maximizing agents, sociological humans- though still calculating and pursuing interests- define their interests and modify their behavior within a normative context."¹⁷⁰ The reason he argues that states took part in that sociological dialogue; was clear. As these debates were determining availability of their policy options; Arab

¹⁶⁸ Ibid., pp.7- 8.

¹⁶⁹ Ibid., p.8.

¹⁷⁰ Ibid., pp. 8- 10.

states had every reason to take part in them. Along with that factor was another which entailed how Arabism was a mechanism that was employed for justification of the regimes both to domestic and outer Arab societies. Thus, for Barnett nationalism functions as a structural constraint; but one which is not static or given; but rather debated upon and reproduced.¹⁷¹

Another argument that draws attention in Barnett's argument is the importance he attaches to the war for hearts and minds in Arab politics as well as the deployment of symbolic politics. Thus, Arab leaders are considered once again as active participants in defining the terms and norms of Arabism that encircles them when they competed with each other through symbols of Arabism. Thus, along with military politics; Barnett argues, symbolic politics mattered in relation to issues such as power politics, social control and domination.

Barnett also sheds light on stateness and argues that the realist argument that weak states incline towards nationalism while stronger ones on power politics is misleading. He accuses those accounts of pretending that domestic politics shapes foreign policy while once interstate relations come to the picture; those processes are ignored. According to Barnett; domestic structures are not the source of international norms; rather they are shaped through interstate interactions, the result being differentiation among Arab states.¹⁷²

In sum, Barnett's constructivist study opens up questions on the role of ideational factors in defining state identities and their policies. He argues that while Arab politics is rightly renowned for its conflict; the sources of this conflict lie not at anarchical

¹⁷¹ Ibid., pp. 20- 26 and p.239.

¹⁷² Ibid., pp.13-15.

conditions and concern for preserving balance of power; but at the desire to define norms of Arabism. Accordingly, he claims that tools of this conflict are met not from military arsenals but from the cultural storehouse of Arabism as several turning points in the history of Arabism proves.

As to the extent of Middle Eastern exceptionalism one can raise in his work; Barnett claims that Arab politics has "a social foundation that is culturally distinctive yet theoretically recognizable". Thus, he argues that his focus on Arabism serves both to understand particularities in the Middle East while at the same raising crucial lessons for the overall study of international relations.¹⁷³

Barnett's contribution to the theoretical study of Middle East can not be ignored. However, those who argue that he rather disregards some realities on the ground and the fact that deception has been rampant in use of ideologies also have their points. This said, however, Barnett's study not only bridges the gap between IR and MES, but also paves the way for a non-realist if not a post-positivist reading of Middle East politics.

¹⁷³ Ibid., pp. 237- 238.

CHAPTER 4

CRITICAL SECURITY STUDIES APPROACH

Most important component of any discussion on the Middle East international relations has been the very concept of security. In addition to the conclusions that were listed in the previous sections; this chapter tries to look at security in general, in a critical way. In the previous chapters, I have tried rather to relate how the Middle East can be perceived from a critical perspective by inserting discussions where necessary. This chapter will not deal with the Middle East in particular but will try to put forward the perspective of Critical Security Studies as an alternative way of thinking about the question of security in general.

As Pinar Bilgin shows in her extensive study, critical thinking about security in the Middle East enables us to think about the constitutive relationship between theory, representations and practice, how regional insecurities are shaped by their various representations, how theories are actually loaded with various normative premises and how opening up definitions of geographical entities enable us to deconstruct some of the most prevalent assumptions about regional security.¹⁷⁴

Critical Security Studies school makes problematic the very concept of security. Employing Frankfurt School's linkage between knowledge/discourse and interest, Critical Security Studies scholars draw attention to mutually constitutive relationship between security and interest.

¹⁷⁴ Pinar Bilgin, *Regional Security in the Middle East*, op.cit., pp.1- 14.

Ken Booth, in his famous article "Security and Self: Reflections of a Fallen Realist"¹⁷⁵ explains how hard it has been for a university teacher to remain free of the realist paradigm; especially in the mid 60s and 70s. He also reflects on the making of the mind-set of a student and links the thought nature of "security people." Booth still continues to teach and thus he should be reminding his students that they are experiencing an intellectually if not materially luxurious time.

It would be hard to reject such an argument outright; but who could deny that realism is still the dominant feature of any International Relations curricula if not overtly; but tacitly. Aren't in the year 2005 too, students of International Relations more exposed to orthodox readings of IR let it be in classes, the deadliest one-, in public lectures, conferences and in the media.

A Booth like intellectual, Steve Smith, who says he had traveled a long and positivist road to get to the critical point where he is¹⁷⁶, on the other hand may argue that today's IR students have the advantage of enjoying a vast critical literature on IR and are freed from the stifling weather of the Cold War, would agree with the above fact but would immediately oppose it as well.

So; it is obvious that present day students of IR are caught by a novel paradox which both plays into their "heads" and at the same time confuses them. They are still threatened by the temptations of orthodox view of IR but at the same time reminded of the critical paradigm to a great degree.

¹⁷⁵ Ken Booth, "Security and Self: Reflections of a Fallen Realist" in Keith Krause and Michael C. Williams (eds.), *Critical Security Studies: Concepts and Cases* (Minneapolis: University of Minnesota Press, 1997) pp. 83-120.

¹⁷⁶ Steve Smith, "The Self-Images of a Discipline: A Genealogy of International Relations Theory" in Steve Smith and Ken Booth (eds.), *International Relations Theory Today* (Cambridge: Polity Press, 1995), p. 30.

Examining "critical security studies" is pretty much the result of a similar paradox. First, there is the conventional view of "security studies"; second the "critical" and a convergence of the seemed quite weird, initially. Still; my images of the "security studies" and "critical" clash and doubt the critical capacity of critical security studies, at least for some accounts, to a certain extent.

Against this background, one should try to understand how critical security studies challenge orthodox view of International Relations. To do that it first tries to understand what is different in critical security studies and then compares it with the orthodox view. Bearing in mind the plurality within critical security studies; this section concludes that critical security studies pose a challenge to the epistemological and ontological foundations of the view of security of the orthodox paradigm of IR.

Since the end of the Cold War, while some scholars were celebrating the victory of the West against the Soviets and by what of that against any possible alternative design; various intellectuals let them be neo-realists or critically thinking scholars; started to identify the changing nature of both the international environment and the threats to the security of the state in the new era. ¹⁷⁷

However, what is referred by the term critical security studies sought a broader task than that. Rather than taking the orthodox view of international relations for granted, it problematized the term security, the very object of the security by asking what is to be secured, the ways to achieve that critical conceptions of security and the implications of these all for the broader sphere of international relations. As a consequence of such overall process of contemplation; the initial scope of the very term security broadened in a way to include

¹⁷⁷ See, Barry Buzan, " New Patterns of Global Security in the Twenty-First Century", *International Affairs* 67, 3 (1991) pp. 431-451.

such realms like the environmental security, the problem of emancipation as key aim of security¹⁷⁸, the patriarchal conceptions of security, security of the people and the citizens and the state as such. It also draws attention to the intact relation between theory and practice¹⁷⁹ rather taking them radically different realms.

On the other hand, we should be aware of the fact that what we refer to critical security studies is no monolithic sphere of thought. There are great differences between reflections of scholars that are grouped under scholars of critical security studies and each of their accounts priorities certain aspects of the problem and omit certain others.

Orthodox security studies as comprehended by the dominant paradigms of IR, namely classical and to greater extent structural (neo) realism, is challenged for its conceptions of the very term security through asking a crucial question: What is to be secured. Neo-realist accounts of security studies have a short answer to this question: The state itself.¹⁸⁰ However; through reflecting on this question, critical security scholars come up with three alternative conceptions of the subject of security.¹⁸¹

The three set of challenges has been united by a desire to treat the object of security not as the sovereign state but as the individual. Thus, security is a condition that individuals enjoy, and they are given primacy for both in the definition of the threats and of who is to be

¹⁷⁸ Ken Booth, "Security and Emancipation", *Review of International Studies* Vol.17 No.4, pp.313-326.

¹⁷⁹ Steve Smith, " International Relations and international relations: The Link Between Theory and Practice in World Politics", *Journal of International Relations and Development*, Vol.6, No.3, pp.233-239.

¹⁸⁰ Challenges to this argument by critical security studies scholars will be presented in later sections of this paper.

¹⁸¹ The summary of three views are taken from, Keith Krause and Michael C. Williams, "From Strategy to Security: Foundations of Critical Security Studies" in Krause and Williams, op.cit., pp. 44-47.

secured. In this view, the security of the individual does not equate to or not necessarily be represented by the security of the state as in the orthodox view of international relations.

This reorientation to the understanding of the security allows critical security intellectuals to come up with three alternative versions:

The first makes individuals qua persons the object of security. In this view, protection of individuals within a community is not equated with support for states. Therefore; they focus on the individual human rights and promotion of the rule of law, which protects persons from each other and from predatory state institutions.¹⁸²

In that perspective; freedom from torture, wrongful imprisonment and daily violence or privation are possible threats to the well-being of individuals; which is a concern that is not baseless given that source of many conflicts in the present world are rooted in intra-state clashes and is related to the very treatment of the international community of such issues.

The outcome of such an approach on the other hand results in the discussions and legitimization of the so called humanitarian intervention. This very point reflects the paradoxes that are inherent in alternative definitions of security despite their imperativeness. To rephrase; while its implications in policy terms remain unclear and contested this focus represents a clear challenge to the claim that state sovereignty provides the sole locus of authority and security for its citizens.

The second view which focuses on individuals qua citizens reflects on the way in which the most direct threats to individuals can come not from the anarchic world of international relations and the citizens of

¹⁸² Ibid., p.44.

other states, but from the institutions of organized violence of their own state.

This very fact is radically obscured by the neo-realists. However; as a study of say, security in the Middle East; is not solely focused on inter-state clashes but to a great extent on intra-state clashes and insecurities emanating from there. The very process of state formation and state capacity in other words would be crucial elements in defining the sources of such conflicts not merely in the Middle East but also in the wider Third World.

Mohammed Ayoob argues that the state-centric and contractarian tenets of the classic neo-realist conception obscure the fact that in many places the state is not the guarantor of security but is rather the greatest threat to its citizens.¹⁸³ Ole Weaver's societal security is another crucial aspect of such perspective.¹⁸⁴ The neorealist view according to these scholars, results in an identification of "us" which becomes a precondition for actions against "them." They give the example of the ethnic cleansing in former Yugoslavia.

The third perspective as emanating from the critical security studies takes individuals as the objects of security. It treats them as members of a transcendent human community with common global concerns. When the focus of security shifts to the individual; the individual becomes prone to the broadest global threats. Thus; issues such as environmental security are allowed to emerge from the neorealist

¹⁸³ Mohammed Ayoob, "Defining Security: A Subaltern Realist Perspective" in Kraue and Williams, op.cit., pp.121-148. For another account of Ayoob which argues that the process of state-making in the Third World lies behind the security problematique see, Mohammed Ayoob, "Subaltern Realism: International Relations Theory Meets the Third World" in Stephanie G. Neuman (ed.), *International Relations Theory and the Third World* (New York: St. Martin's Press, 1998), p.34.

¹⁸⁴ See Barry Buzan, Ole Weaver and Jaap de Wilde, *Security: A New Framework for Analysis*, (Boulder, Colo.: Lynne Rienner, 1998), especially chapter 6, "the Societal Sector."

shadows as threats to the security of the human kind, and often threats that cross political boundaries.

For example proponents of this perspective argue that environmental degradation poses as big a threat to the individuals as organized internal or external violence does. They are more concerned with the futuristic conceptions of security however and via accepting themselves not merely as holders of the passport of a certain state; on the contrary, they conceive themselves as of individuals of a transnational human organization which is not necessarily a nation state or an international organization. I would add here the issue of feminism that is central to critical security studies discourses as well.

To quote Krause and Williams at greater length:

Each of these threads of argument challenges the vision of sovereignty underlying the neo-realist conception of security. In the first case, the claims of sovereignty must be limited by the more basic rights claims of individual persons. In the second, the state as a source of threat to citizens themselves, and the disjuncture between state and society, is highlighted. In the third, narrow conceptions of national interest and state sovereignty are seen to limit our ability to deal with security issues whose source and solution stand beyond statist structures and assumptions. Making the individual the object of security provides the conceptual shift that allows these perspectives to take their place as central elements of any comprehensive understanding of security.¹⁸⁵

The above analyses I believe have reflected on the scope of critical security studies. This section takes the issue with the theoretical foundations of orthodox view of security studies.

First; I believe that critical security studies have contributed to the IR theory by bringing to the forefront the discursive aspects of the orthodox view. The perceived "facts" of the "reality" however is

¹⁸⁵ Krause and Williams, *From Strategy to Security*, op.cit., pp.45-46.

reflective of certain perceptions of the political, the state, the individual and thus emanating from all of these the security as a concept.

The positivistic nature of neo-realist theory argues that there stands a reality over there. They pursue this understanding with a view of social sciences where the "reality" is to be studied objectively.

Critical security studies on the other hand, makes problematic this view. The classical view rests on a claim about the necessary nature and limits of politics and political order. By making the definition of the political a question rather than an assumption, Krause and Williams argue, one can illuminate the dynamics of contemporary security debates at both policy-making and scholarly levels.

The neo-realist claims of states as actors and the identification of security exclusively with citizenship that underpin the orthodox conception of security studies thus, can be expressed as problematic, its epistemological claims can be shown to be suspected and inadequately grounded, and its view of the relationship between theory and practice can be demonstrated as insufficient.¹⁸⁶

The orthodox view of international relations treats both the object of security and the means for studying it as largely given and self-evident. In this way, they provide the discipline with a shared framework and a common analytic culture for understanding¹⁸⁷

The bottomline is that; neo-realism's structural analyses of anarchy that underpin the actions of states in that anarchical environment constructs the possibilities for political order, of the realm of politics, and thus security yields both an object to secure (the territorially

¹⁸⁶ Krause and Williams, "Preface", in Krause and Williams op.cit.

¹⁸⁷ Ibid.

defined political community) and an all-powerful and legitimate agent to pursue this end (the state.)¹⁸⁸

However; as was presented above, the orthodox view of IR is replete with many silencing processes. The neorealists simply ask the simple question of what is being rendered secure by the provision of national and international security.¹⁸⁹

These silences result in nothing but a "national security state" which is eternally in a state of emergency.¹⁹⁰ Also while referring to the positivistic foundations of orthodox security studies Dalby points to the above fact:

The assumption that most, if not all, things are both knowable and hence predictable through the application of social scientific methods and reasoning is intimately related to the formulation of security as the management and control of risks and threats.¹⁹¹

In conclusion; on the epistemological challenge to the conventional understanding of security and the object to be challenged necessitate a shift in these propositions. The shift involves a shift in focus from abstract individualism and contractual sovereignty to a stress on culture, civilization and identity; the role of ideas, norms, and values in the constitution of that which is to be secured; and the historical context within which this process takes place. Epistemologically; this involves moving away from the objectivist, rationalist approach of neorealism and toward more interpretative modes of analyses.¹⁹² In other words; the paradigm of orthodox security studies should be

¹⁸⁸ Ibid.

¹⁸⁹ Simon Dalby, "Contesting an Essential Concept: Reading the Dilemmas in Contemporary Security discourse" in Krause and Williams op.cit, p.8.

¹⁹⁰ Ibid., p.21.

¹⁹¹ Ibid., p.26.

¹⁹² Krause and Williams, op.cit., p.49.

challenged in a way to broaden both the definition and the treatment of security.

I will terminate this section with a quotation from R. B.J. Walker; which in my opinions covers all of the issues discussed above:

The crucial subject of security, in short, is the subject of security. And the crucial understanding of the subject of security focuses precisely on the claims of the modern sovereign state to be able to define what and where the political must be. In one way or another, the twin arguments that dominate contemporary debates about security- about the state as both source of and solution to the pervasive insecurities of modern life and the continuing relevance or increasing irrelevance of the state as solution if not as source- tend to work well within a statist account of what it means to have a subjectivity that might be made secure. Security cannot be understood, or reconceptualized, or reconstructed without paying attention to the constitutive account of the political that has made the prevailing accounts of security seem so plausible.¹⁹³

In my view; critical security studies with its failures and obscurations is a crucial attempt at so doing. According to Pinar Bilgin, this becomes even more relevant while studying the Middle East as the region has developed to its present condition partly due to the way it has been represented by the dominant security discourses.¹⁹⁴ The CSS scholars would also problematize the very terms that shape our security understanding. Presenting the interest basis of using certain terms is certainly enlightening; and even more so in the Middle East. According to Bilgin, a top-down conception of security in the Middle East is reflective of "western" interests which could be summed up as the unhindered flow of oil at reasonable prices, the cessation of the Arab-Israeli conflict, the prevention of the emergence of any regional hegemon while holding Islamism in check and the maintenance of 'friendly' regimes that are sensitive to these concerns. This would also compound the securitization of the region as it allows regional policy-

¹⁹³ R.B.J. Walker, "The Subject of Security" in Kraus and Williams, op.cit.

□ Pinar Bilgin, "Whose 'Middle East'? Geopolitical Inventions and Practices of Security", *International Relations*, Vol.18, No.1, (2004), pp. 25-41.

makers to justify certain domestic security measures by way of presenting the international arena as anarchical and stressing the need to strengthen the state to cope with external threats.¹⁹⁵

This very brief analysis of critical security studies, which would deserve a far larger place in an extensive paper, prove that among challengers; it is the leading one: A "real challenge" to the neorealist worldview of security; in revealing the underlying interest based conceptions of security and anarchy.

¹⁹⁵ Ibid., pp.28-29.

CHAPTER 5

CONCLUSION

This study tried to examine the state of the art of the study of Middle East through the lenses of International Relations. Its basic question was to see to what extent changes and continuities in International Relations Theories informed study of the international relations of the Middle East.

Thus, the thesis at hand first looked into the disciplines- area studies controversy which informs the question at hand to a great extent. In order to explicate the root causes of low level of intellectual interaction between International Relations and Middle East Studies, the birth and development of both is examined. The conclusion that draws is that the gap between IR and MES lie at their constructed disciplinary politics and epistemologies. While MES was interested in gathering data; IR was looking for law-like generalizations in order to explain international politics. Coupling these factors on the other hand, was another crucial aspect, which was the political economy of funding the programs and professors informed by continuous ideological/ intellectual rivalries.

After setting the defining context of the research question in the second chapter, the thesis looked into a selected set of examples from the literature in order to demonstrate the applications of IR theories to the Middle Eastern international relations. Thus, chapter three looked into several studies grouped under historical analysis, realism and its modifications, foreign policy analysis, and constructivism in order to account for how IR theories informed study of the Middle East. Chapter four on the other hand examines the insights of Critical Security

Studies approach in a way to stand for the normatively informed premises of this study. The conclusions drawn from Chapters three and four is that first, developments in IR theory is not adequately reflected in the study of the Middle Eastern international relations due to conclusions drawn from the second chapter, and second, that without overcoming ethnocentric bias inherent in IR through critical theory building; the orthodox voices of IR will represent and reproduce an undertheorized image of the international relations of the Middle East.

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